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**ABSTRACT**

This Food Service Training Manual offers 11 lessons and 3 tests on personnel management. Lesson 1 introduces the subject and discusses five functions--from planning through evaluating--of the management process. Lesson 2 covers management's responsibilities and approaches and the pitfalls of decision-making. Verbal and nonverbal communication in management is lesson 3's concern, while lesson 4 suggests tools, including job analysis, for managing human resources. Lesson 6 discusses staffing requirements and patterns, and lesson 7 the techniques for recruiting qualified employees. Formal training is addressed in lesson 8, and functions and analysis of meetings in lesson 9. Advantages and purposes of work scheduling are the subjects of lesson 11, and lesson 12 describes the importance of appraising employee performance. Lesson 13 looks at the background and advantages of food service unions. Lessons 5, 10, and 14 present progress tests covering material discussed in the substantive lessons, and appendixes offering guidelines for stimulating meetings complete the manual. (KS)

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# Personnel Management

Michigan School Food Service Training Manual

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Child Nutrition Programs are available to all eligible children regardless of race, color, or national origin.

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FOR MANAGERS/DIRECTORS

Lesson 1

INTRODUCTION TO PERSONNEL MANAGEMENT IN FOODSERVICE

A. GOAL OF THIS LESSON

The goal of this lesson is to understand the basic roles and functions food service managers assume in performing their jobs.

B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. define the term management,
2. identify program goals in all Child Nutrition Programs,
3. identify the various resources foodservice managers have available, and
4. apply the basic functions of management to an assigned school foodservice situation or activity.

C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of handout materials.
2. Arrange for blackboard in classroom or overhead projector.
3. Arrange for video-tape from local ISD office or State Library (phone: 517/374-9633).
4. Arrange for showing equipment, ISD Office, Local business (car dealer).

D. KEY WORDS USED IN THIS LESSON

MANAGEMENT: a system of using resources to achieve goals

FIXING OF ACCOUNTABILITY: to determine person(s) responsible or accountable for a specific area of function in a department

E. REFERENCES FOR ADDITIONAL INFORMATION

- Glueck, W.F. Personnel. 1978. Homewood, IL R.D. Irwin, Inc. (\$19.95)
- Heneman, H.G., D.P. Schwab, J.A. Fossum and L.D. Dyer. 1980. Personnel/Human Resource Management, Homewood, IL., D. Irwin, Inc. (\$19.95).
- Lundberg, D.E. and Armatas, J.P. The Management of People in Hotels, Restaurants, and Clubs, 1980. Dubuque, Iowa, Wm. D. Brown Company, Fourth Edition. (\$19.95)
- Miner, John B. and M.G. Miner. Personnel and Industrial Relations, 1977. New York, NY, Macmillan Publishing Co., Inc., Third Edition



## Lesson 1: INTRODUCTION TO PERSONNEL MANAGEMENT IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>I. Introduction to Personnel Management: Good management practices are necessary if Child Nutrition Programs are to be successful.</p> <p>A. Definition of <u>Management</u>: (Write on board after class activity at right)</p> <ol style="list-style-type: none"><li>1. <u>Management</u> is a system of <u>using resources</u> to achieve goals.</li><li>2. School foodservice personnel must make the <u>best</u> use (usually a proven organized system) of all <u>resources</u> available to them to achieve the foodservice program goals.</li><li>3. Program goals include providing:<ol style="list-style-type: none"><li>a. meals of high quality acceptable to customers</li><li>b. nutrition education appropriate to customers</li><li>c. meals that meet government regulations and assure nutritional integrity for the health of all customers</li><li>d. meals at lowest possible price to customers.</li></ol></li></ol> <p>B. Management has many resources available as they strive to achieve program goals.</p> <ol style="list-style-type: none"><li>1. These resources can be considered as the <u>foundation of management</u> and are sometimes call the "<u>M</u>"s of Management.</li></ol> | <p>Ask participants to define <u>management</u>. Attempt to lead them into using the words: <u>system</u> (management means organized and orderly), <u>using resources</u> (use of whatever you have on-hand), and <u>goals</u> (management means activity is directed or aimed at accomplishment of something).</p> <p>As a class, identify the foodservice program goals listed at the left and write them on the black board for later reference.</p> |

# Lesson 1: INTRODUCTION TO PERSONNEL MANAGEMENT IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | CLASS ACTIVITY |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>2. They include the following resources:</p> <ul style="list-style-type: none"> <li>a. men and women...the foodservice personnel or labor available</li> <li>b. machines...or the equipment available</li> <li>c. materials...or the food and supplies you have available</li> <li>d. money...or the food budget you have available</li> <li>e. minutes...or the time you have available</li> <li>f. markets...or the "publics" available such as students, administrators, faculty, parents, advisory groups, civic groups, and government groups</li> </ul> <p>This manual focuses on the resource of labor or the foodservice workers available and how to make the best use of them.</p> <p>C. Before management begins to think about how available labor can be used best, several questions should be answered:</p> <ul style="list-style-type: none"> <li>1. What are realistic objectives for the school food-service program based on the goals listed on the board from the previous page?</li> <li>2. To what extent is the foodservice program now achieving these objectives?</li> <li>3. How can available resources (list of 6 items from this page) be used to enable foodservice programs to <u>better</u> achieve their objectives?</li> </ul> |                |

## Lesson 1: INTRODUCTION TO PERSONNEL MANAGEMENT IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>II. What is the Process of Management?</p> <p>The Process of Management is made up of 5 basic functions listed below.</p> <p>A. <u>Planning Function</u> - This function involves thinking ahead and using creativity to establish objectives. Planning may require the use of past records such as budgets, production sheets, purchasing invoices and participation records. Planning may also involve consulting with others in your department who have experience relevant to what you are planning.</p> <p>B. <u>Organizing Function</u> - This function involves developing an organization (or department) to accomplish the planned objectives identified in the step above. This may include developing a menu cycle, purchasing of foods, determining who will prepare what foods or the delegation of responsibility and authority for certain parts of your plan, as well as the fixing of accountability.</p> <p>C. <u>Directing Function</u> - The directing function is where the plans are implemented and it has three parts:</p> <ol style="list-style-type: none"><li>1. <u>Supervising</u> - This is defined as overseeing whether the plans and orders you have given are being carried out.</li></ol> | <p>Using the list of goals previously written on the board, identify several objectives under each goal. For example, for the goal, "provides meals of high quality acceptable to customers," an objective might be:</p> <ol style="list-style-type: none"><li>a) hold student taste panels once per month to determine customer acceptability of currently used menu items, or</li><li>b) purchase highest quality foods possible within given budget guidelines.</li></ol> <p>After identifying objectives under each goal, ask yourself:</p> <ol style="list-style-type: none"><li>1. How well am I reaching these objectives in my foodservice operation?</li><li>2. How can I better achieve each of these objectives?</li></ol> |

# Lesson 1: INTRODUCTION TO PERSONNEL MANAGEMENT IN FOODSERVICE

## LESSON CONTENT

2. controlling - This means seeing that the objectives planned are being carried out in the manner specified.
  3. coordinating - This part of directing assures that the operation of the different departments or areas are operating together smoothly. Coordinating the cooking requirements of the kitchen with the time schedule for the serving line would be an example of this function.
- D. Representing Function - This function involves the role of the manager/director and other foodservice personnel in representing the foodservice department as a whole to their many publics.
1. The manager/director represents the district and its administrators to the employees (downward representation).
  2. They also represent the employees to the administration and the School Board (upward representation).
  3. They also represent employees to the community including parents and civic groups (horizontal representation)
- E. Evaluating Function - This function is the process of determining whether plans to achieve objectives (or goals) are effective.
1. This may mean an achievement of an economic objective such as increasing total sales through increased participation.
  2. It may be in terms of human relations such as improved cooperation between the foodservice department and the teaching staff in the school.

## CLASS ACTIVITY

Ask participants to give a definition or example of what is meant by "fixing of accountability".

(Example: If you put Sara, a cook, in charge of keeping the storeroom neat, organized and rotated she must answer to any situation that finds the storeroom unorganized or stock not rotated).



# Lesson 1: INTRODUCTION TO PERSONNEL MANAGEMENT IN FOODSERVICE

## LESSON CONTENT

III. To understand how these 5 functions in the management process can be applied to a foodservice setting, present the sample situation on Handout #1-1. Review what activities should be done under each of the 5 functions listed to make this group function successful.

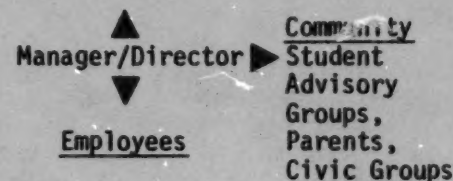
IV. If time permits, complete the second activity on the application of the 5 functions of management (Handout #1-2). If there are more than 3 small groups of participants, assign the same topic to more than one group, or select additional "special meal projects" that could be used for this activity.

MSU-NET  
FSHN/81

## CLASS ACTIVITY

Draw this diagram on chalk board

School Board  
Administration



Have participants discuss the sample situation using Handout #1-1 as a reference.

Divide participants into small groups of 4 to 6 persons each. Ask each group to use the 5 functions of management as listed on Handout #1-2 and apply them to a special program or project concerning one of the following topics as assigned:

Michigan Week for elementary school  
Nutrition Month for high school  
School Lunch Week for middle school

son 1: INTRODUCTION TO PERSONNEL MANAGEMENT IN FOODSERVICE

| LESSON CONTENT | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                | <p><u>Instructor Notes:</u> Groups need to have a secretary. This can easily be done by asking the person with their first name beginning with the letter closest to "A" in the alphabet to act as group secretary.</p> <p>Also, groups generally get too involved in Step 1, the Planning Function. Remind them that they don't have to make the actual decisions, but just note that such decisions have to be made. For example, on their outline they may say, "Determine how art classes can become involved with School Lunch Week." They do not need to determine exactly what the art classes will do.</p> |

HANDOUT #1-1

USING THE 5 FUNCTIONS OF MANAGEMENT

Situation:

The foodservice department has been asked to coordinate and plan a breakfast honoring the parent volunteers who have donated their time to classroom activities during the past year. The breakfast is scheduled for Friday, June 7 at 8:15 a.m. The normal school class schedule begins at 9:00 a.m. This activity is to be planned and implemented by both the foodservice department and the teachers as a thank-you to parents who have regularly volunteered to help with class programs and activities. There will be approximately 150 persons attending the breakfast including parents, teachers and staff.

A. Planning Function - Example

1. identify (select) planning committee
2. list their duties or responsibilities
  - a. develop menu and style of service (buffet, family service, or other)
  - b. determine room to use for preparation and service and table arrangement
  - c. determine staffing needs (teacher volunteers to serve or kitchen workers)
  - d. determine equipment needs
  - e. determine decoration needs
  - f. determine amounts of foods or production requirements as needed

B. Organizing Function - Example

1. determine exactly who will do the various duties listed in step A above under Planning Function.
2. make sure responsibilities of all are understood by all
  - a. select planning committee members including teachers and representatives from the foodservice department.
  - b. have the committee elect a chairperson.
  - c. have committee decide which members will be in charge of each activity listed during the planning function.
  - d. determine what employees from the foodservice department will be needed for preparation and/or service.
  - e. determine as a committee any decisions that have to be made together and delegate remaining decisions to the persons in charge of each specific area or activity. For example, if the person in charge of setting up the table and chairs in the room asks how it is to be done, the committee may decide to let that person evaluate the room and decide on the seating arrangement to the best of their availability.

C. Directing Function - Example

1. determine who is to be "boss" for this function on the actual day it occurs. Will the committee chairperson fulfill this role?
2. it must be very clear who will assign duties on the day of the breakfast, so only one person is responsible for supervising, controlling and coordinating. This person, however, may decide to delegate some of this authority but everyone should be aware of this decision.

D. Representing Function - Example

1. determine who is going to represent the school at this function...the principal?
2. determine who is going to represent the school to the news media to get local coverage of this event...the chairperson of the planning committee?
3. determine who is going to represent the school to the parents invited to this breakfast...the teachers from each grade?

E. Evaluating Function - Example

1. determine how you can evaluate this function to determine if it was a success?
2. determine who is going to do this evaluation?

If all the school teachers are at the breakfast mixing with the parents, perhaps a survey of teachers after the breakfast to determine parent reactions to this event would provide the desired feedback. A written summary of these teacher comments could provide helpful hints on improving such an event if repeated in the future.

3. determine who will write up the evaluation summary from the teachers and where will the information be filed for reference next year?



## FUNCTIONS OF MANAGEMENT

### HANDOUT #1-2

Using the 5 functions of management listed below, fill in activities under each function for the topic your group is assigned.

Topic Assigned: \_\_\_\_\_

1. Planning Function -

2. Organizing Function -

3. Directing Function -

Supervising:

Controlling:

Coordinating:

4. Representing Function -

5. Evaluating Function -

FOR MANAGERS/DIRECTORS

Lesson 2

THE ROLE OF SCHOOL FOODSERVICE MANAGEMENT

A. GOAL OF THIS LESSON

The goals of this lesson are:

1. to understand the responsibilities of a foodservice manager/director.
2. to learn to make effective decisions to accomplish and implement these responsibilities.

B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. identify the major responsibilities of the school foodservice manager/director
2. identify and apply the 6 steps of effective decision making, and
3. describe various management styles.

C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of handouts.
2. Identify examples of pitfall situations to use in discussion in section IV of this lesson.
3. Arrange for blackboard.

D. KEY WORDS USED IN THIS LESSON

1. DECISION-MAKING: the process of choosing between several alternatives the best way to resolve a problem or to determine preference or choice in a situation.
2. MANAGEMENT APPROACH: the view a manager has about how one should manage people.

3. RESPONSIBILITIES: the obligations and assignments which employees accept as they agree to do a job.
4. MANAGEMENT STYLES: the basic philosophical approaches used by managers while supervising people; includes very scientific/technical view points on one extreme to participative/humanistic view points on the other.
5. ROLE PLAY: a group activity where individuals act out the roles of persons described in a given situation.

E. REFERENCES FOR ADDITIONAL INFORMATION

1. Lundberg, D.E., and Armatas, J.P. The Management of People in Hotels, Restaurants, and Clubs. (see lesson 1)

## Lesson 2: THE ROLE OF SCHOOL FOODSERVICE MANAGEMENT

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>I. Management has certain responsibilities dependent, in part, upon the specific school foodservice organization. Included are responsibilities for:</p> <ul style="list-style-type: none"><li>*obtaining food and supplies,</li><li>*directing personnel in the foodservice department,</li><li>*supervising food preparation, service and clean-up,</li><li>*maintaining facilities and equipment,</li><li>*maintaining adequate records,</li><li>*maintaining standards of health, sanitation and safety, and</li><li>*developing desirable relationships with other school staff, parents, students and the community.</li></ul> <p>II. In order to carry-out these responsibilities, a manager/director must make decisions constantly. These decisions are made based on the resources presently available to attain established goals for the foodservice department.</p> <p>A. Decisions are made using the following 6 step approach:</p> <ol style="list-style-type: none"><li>1. identify the problem and define what must be done,</li><li>2. seek all possible alternatives or solutions,</li><li>3. evaluate alternatives and possible solutions,</li><li>4. determine the best solution,</li><li>5. implement the best solution, and</li><li>6. evaluate that solution immediately and periodically.</li></ol> | <p>List these 7 responsibilities on the board</p> <p>With class participants, brainstorm examples of tasks which school foodservice managers/directors must perform as they carry out each of the responsibilities listed at the left.</p> <p>Example: Directing Personnel - Develops weekly employee work schedule 2 weeks in advance.</p> <p>Using Handout #2-1, divide into small groups and apply the decision making or problem solving steps to the situations presented in the handout. Allow 15-20 minutes for each group to complete the 6 decision making steps. Have each group report results to entire group.</p> |



## Lesson 2: THE ROLE OF SCHOOL FOODSERVICE MANAGEMENT

### LESSON CONTENT

- B. The steps of decision making are an automatic thinking process that enables employees or supervisors to plan day-to-day operational activities.

For example, what food will you substitute if an item on your menu runs short? The same steps would be planned in writing on paper for more long range, more complex decisions such as changing the counter set-up or reducing employee labor hours.

### III. When Making Decisions, remember:

- A. that decisions involving people are always difficult. Why do you think this is true?
- B. that the best decision today may become obsolete some day and the problem will have to be thought out again,
- C. that every important solution should be chosen from alternatives, and
- D. that major decisions which cause change are seldom welcome by employees and it will take courage to implement.

### IV. Pitfalls in decision making may include the following things:

- A. finding the right answer but to the wrong problem. Make sure you correctly define the problem.
- B. making a decision at the wrong time. If you did nothing would the problem correct itself tomorrow? Will factors or situations yet to come influence the problem?
- C. making decisions that cannot be implemented.

### CLASS ACTIVITY

Ask participants to list on the board the 6 steps of decision making involved in the following situation. Your cook tells you there are not enough peas to get through all of the lunch period. What should she substitute?

Ask participants to try and identify examples of these pitfall situations.

Note to Instructor - Attempt to do this yourself in advance with local or relevant examples in case participants cannot think of any.

Lesson 2: THE ROLE OF SCHOOL FOODSERVICE MANAGEMENT

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                               |
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| <p>D. utilizing insufficient or inaccurate information when collecting possible solutions to problems</p> <p>E. inaccurately assessing reactions of people affected by your decision.</p> <p>F. refusing to decide or to make a decision (deciding <u>not</u> to decide is a decision).</p> <p>G. making a decision at the wrong level when it should have been passed up to the managerial level.</p> <p>V. When making decisions, a Manager/Director may take a variety of approaches. Two standard approaches are listed below.</p> <p>A. A manager/director with a traditional management approach (sometimes called a Theory X Manager) assumes that:</p> <ol style="list-style-type: none"> <li>1. people want well defined assignments, one at a time</li> <li>2. some employees are aggressive and strong and may take over a manager's authority,</li> <li>3. the boss gives instructions and doesn't need to explain why,</li> <li>4. people need control and direction, and</li> <li>5. people enjoy work when it is under correct and wise control.</li> </ol> <p>B. A manager who uses a more modern management approach (sometimes call a Theory Y Manager assumes that:</p> <ol style="list-style-type: none"> <li>1. people want to belong, to be liked, respected and have a say in work decisions,</li> </ol> | <p>In an informal discussion, ask participants if they have ever experienced a Theory X traditional boss, or a Theory Y modern boss. How did it make them feel? Ask participants to relate specific examples or situations.</p> <p>Using Handout #2-2 have participants complete the exercise as explained concerning "Assigning An Unpleasant Task as a Theory X and Theory Y Manager".</p> |

## Lesson 2: THE ROLE OF SCHOOL FOODSERVICE MANAGEMENT

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | CLASS ACTIVITY |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <ul style="list-style-type: none"><li>2. employees need to be encouraged to be assertive and creative,</li><li>3. a leader gives explanations and encourages employee participation,</li><li>4. a leader encourages self-control and self-direction, and</li><li>5. people are happier when given a choice to make some work decisions.</li></ul> <p>C. In reality, most managers use a combination of these styles depending on the situation and the workers involved.</p> <ul style="list-style-type: none"><li>1. This combination of styles used as the situation requires is sometimes call the Contingency Management.</li><li>2. Effective managers using this approach recognize that each employee is an individual and responds differently to supervision.</li><li>3. A student employee may respond best to simple directions in a more autocratic style.</li><li>4. Older, more mature employees may respond best to a management style that offers them a choice in what to do, or asks for their opinion.</li><li>5. An effective manager also recognizes that each employee can be motivated to do a good job and it is the manager's challenge to find out how to accomplish this.</li><li>6. Some workers are highly motivated in very structured, controlled situations, while others require a more "Theory Y" approach where the manager encourages their own creativity and participation in decision making.</li><li>7. A Contingency Manager realizes that employees may have good ideas about how the foodservice program can be improved and thus provides an environment which encourages such contributions.</li></ul> |                |

## HANDOUT #2-1

### DECISION MAKING (Problem Solving)

Decisions are made using the following 6 step approach:

1. identify the problem and define what must be done,
2. seek all possible alternatives or solutions,
3. evaluate alternatives and possible solutions,
4. determine the best solution,
5. implement the best solution, and
6. evaluate that solution immediately and periodically.

Divide participants into small groups and assign one of the following situations to each group. Solve each situation by following the 6 steps above for decision making.

#### Situation 1.

The foodservice manager is walking through the kitchen and notices an employee quickly hiding a cigarette. Smoking is against the rules. What should the manager do in this situation?

#### Situation 2.

You have a cashier who has been working for you for 4 years. During the past 3 months she has come up several dollars short at least once per week. You are beginning to suspect that she is taking the money but you have no direct proof and have never seen her do anything illegal. How would you handle this situation?

#### Situation 3.

You have a head cook named Betty who has been in the school district foodservice system for 14 years. She was just recently transferred to your kitchen. Betty is an excellent cook with very high quality standards. However, she is constantly criticizing other cooks about their cooking methods or end products. She is almost always right in these comments but her manner of telling these lower level cooks has made them dislike her. Morale in the kitchen is becoming very poor because of "Betty's big mouth." How would you handle this situation?

#### Situation 4.

Three months ago a fast food restaurant opened up a half block from your high school that has an "open campus" policy. During these 3 months you have experienced sizeable decrease in participation rates. On some days your count is down by 26%. This is causing you great concern and has also increased amounts of leftover foods due to the



DECISION MAKING cont.

drastic change in your expected customer levels. How would you solve this problem?

Situation 5.

The staff in your elementary school is encouraged to take students on field trips. However on the days of such trips when 80 to 90 students may not attend lunch in your building, you are left with lots of leftover foods. Students buy lunch tickets each morning from a ticket lady who circulates through the building. At about 10 a.m. when she finishes her "rounds" you then are aware of the decreased student counts for the day. You have to order your food in advance from the high school so you are stuck with the leftover food. How would you solve this problem?



Assigning An Unpleasant Task  
As A Theory X and Theory Y Manager

HANDOUT #2-2

As a class review the situations below and ask participants to determine how he/she would give an employee a directive to correct each situation from:

1. a Theory X Manager's point of view (traditional).
2. a Theory Y Manager's point of view (modern).

Share results with entire class.

SITUATION 1

Tom, a student employee, usually returns clean pots, pans and dishes to the proper storage area. But today it is also necessary for him to wash and bleach mop heads and sanitize all trash cans in the kitchen because Paul is absent today.

Theory X:

Theory Y:

SITUATION 2

At 11 o'clock your principal calls and says he is bringing 12 special visitors to the teacher's dining room at noon. He requested a deluxe salad bowl, rolls and a good dessert for this group. You know you have adequate rolls and pies in the freezer but salad bowls will need to be prepared by Sally, a cook, who has worked for you 6 months and is 40 years old.

Theory X:

Theory Y:

## FOR MANAGER/DIRECTORS

### Lesson 3 COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

#### A. GOAL OF THIS LESSON

The goal of this lesson is to understand the importance of clear, systematic verbal and non-verbal communications in the effective operation of a school foodservice operation.

#### B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. apply the OPEA format for giving directives or making requests,
2. identify the advantages and disadvantages of one and two way communication,
3. list basic techniques used in professional telephone communications,
4. list basic techniques used in professional written communications, and
5. identify a variety of non-verbal traits that leave a negative image.

#### C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of handouts.
2. Locate 10 dominoes per every other participant for use with Handout #3-2.
3. Arrange for a blackboard.

#### D. KEY WORDS USED IN THIS LESSON

1. OPEA FORMAT: a communications model involving these four steps: opening (O), point or purpose (P), evidence (E), and action or acceptance (A).

2. VERBAL COMMUNICATIONS: all methods and means of communication that involve an exchange of ideas or messages through words. It includes vocal and written communication.
3. NON-VERBAL COMMUNICATIONS: communications that convey messages without the use of words. It includes body language such as gestures, facial expressions, body position and personal appearance.

E. REFERENCES FOR ADDITIONAL INFORMATION

1. Coffin, R.A., The Communicator, 1975, American Management Associations, Saranac Lake, NY. (\$10.95)
2. Lazarus, S., Loud and Clear, 1975, American Management Associations, Saranac Lake, NY (\$10.95)



Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | CLASS ACTIVITY |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>I. <u>True communications is in the mind of the receiver, in his own frame of reference.</u></p> <p>A. A manager succeeds primarily through his/her ability to project ideas to others, openly both upward to superiors, and downward to employees.</p> <p>B. A good manager has to be able to get his/her ideas across to others in terms that are both understandable and acceptable to employees.</p> <p>C. Dale Carnegie, authority on human relations, said about the power of speech in communications: "We have only 4 contacts with the world by which we are evaluated:</p> <ol style="list-style-type: none"><li>1. <u>by what we do,</u></li><li>2. <u>by how we look,</u></li><li>3. <u>by what we say, and</u></li><li>4. <u>by how we say it."</u></li></ol> <p>D. Words are the working tools of communications which is a person-to-person affair.</p> <p>E. Communication involves at least 2 people: the speaker and the hearer.</p> <p>F. The message interpreted by the listener can be understood or misinterpreted resulting in cooperation or resentment.</p> |                |

Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | CLASS ACTIVITY |
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| <p>G. Communication can be categorized as either verbal or non-verbal. They are discussed in detail below.</p> <p>II. <u>Verbal Communications</u></p> <p>Using words to communicate is done a great deal by everyone, especially by persons in supervisory positions. Word communication can be direct between persons, can be by telephone or can be in writing.</p> <p>A. <u>Personal Communications - Giving Directives or Orders</u></p> <ol style="list-style-type: none"><li>1. For many manager/directors or supervisors, giving directives or orders is something they do many times a day.</li><li>2. To give orders or assignments in a way that will minimize the chances of irritating or antagonizing subordinates takes skill and application of the following format.</li><li>3. The format is called O P E A which stands for:<ol style="list-style-type: none"><li>a. O = Opening</li><li>b. P = Point or Purpose</li><li>c. E = Evidence</li><li>d. A = Action or Acceptance</li></ol></li><li>4. When giving orders or assignments always try to include all 4 of the OPEA steps. This will keep communications directly between you and your co-workers clear, specific and understood.</li></ol> |                |

Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | CLASS ACTIVITY |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>a. <u>O = Opening</u></p> <ol style="list-style-type: none"> <li>(1) Your opening approach needs to gain the attention of your listener(s) and needs to involve their self-interests.</li> <li>(2) You need to state the problem or assignment, perhaps compliment the listener or offer them a challenge.</li> <li>(3) You need to begin in a manner that will tend to put the other person(s) at ease, which might be a subject of common interest.</li> </ol> <p><u>Example:</u> (compliment)<br/>         "Jane, you are one of the most conscientious food servers we have ever had here."</p> <p><u>Example:</u> (common interest)<br/>         "Jane, I know you agree that our main goal in the school lunch program is to provide all children with nutritious foods."</p> <p>b. <u>P = Point or Purpose</u></p> <ol style="list-style-type: none"> <li>(1) Decide what key idea you want to get across.</li> <li>(2) Decide how you can state it clearly and briefly.</li> <li>(3) Decide what general advantages are included in your idea... or the suggestion you want this person to adopt?</li> <li>(4) Basically you need to briefly state what this discussion is all about.</li> </ol> |                |

# Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                         |
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| <p><u>Example:</u><br/>           "In order to have adequate food for all the children we serve, it is critical that we always follow the portion standards set for each menu item."</p> <p>c. <u>E = Evidence</u></p> <ol style="list-style-type: none"> <li>(1) What proof can you offer to substantiate step b, Point or Purpose?</li> <li>(2) What might be motivating factors in this evidence that would move your listener to change and accept your proposal?</li> <li>(3) Can you provide examples, statistics, testimony or a demonstration that would support your point?</li> </ol> <p><u>Example:</u><br/>           "I have noticed that you frequently over-portion for children that you evidently think need "more meat on their bones!" Do you recall that 6 times during the past month we have run out of the main entree for the children who eat at the very end of the last lunch period? Overportioning may have caused, or certainly contributed to this runout of food. This then denied an expected food to those children who ate last."</p> <p>d. <u>A = Action or Acceptance</u></p> <ol style="list-style-type: none"> <li>(1) What end result do you hope to achieve?</li> <li>(2) What action are you requesting of this person?</li> </ol> | <p>Using Handout #3-1, divide into groups of 3 or 4 and assign each group one of the situations listed. Think through your assigned situation using the OPEA formula. Share the results of each small group with the entire class. Suggestions from participants for additional ideas on how to use the formula for each situation presented should be encouraged.</p> |



# Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

## LESSON CONTENT

- (3) How can you close this conversation to gain maximum acceptance of your idea?
- (4) Perhaps restating the point will help strengthen your request.

### Example:

"In order to attain our goal of providing all children with nutritious foods, we must maintain our portion standards. In the future will you only serve the designated portion sizes so we can try to avoid food run-outs? Your being conscientious about providing underweight children with more food is an issue we can discuss with our school nurse. If she feels more food is needed for certain students due to their present health condition then we can establish procedures for that particular situation."

## B. Personal Communications - One or Two Way?

1. Personal communications can be categorized as either one way, or two way.
2. One way communication is just that.
  - a. The speaker does all the talking and,
  - b. never lets the listener (receiver) speak or ask questions.

## CLASS ACTIVITY

To exemplify the differences in one and two way communications, pair-off participants and complete the exercise described on Handout #3-2.

### Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | CLASS ACTIVITY |
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| <p><u>Example:</u><br/>Haven't we all heard statements like, "Joe, go mop up the water on the floor." Joe never said a word, and probably wasn't allowed time to say anything. He was just ordered to do it.</p> <p>3. <u>Two way communication</u> means that both persons involved in the communication offer conversation which provides additional information to both parties.</p> <p>a. Two way conversation is preferred in most situations since each person <u>participates and can ask questions if something is not clear.</u></p> <p>b. However, there are situations when one way communication is preferred:</p> <p>(1) when simplicity is required:</p> <p>(a) This might occur in a large group or when there is no decision by the receiver wanted.</p> <p><u>Example:</u><br/>"Everyone finish their lunch in the next 10 minutes and report to their stations by 1:30."</p> <p>(b) It may be used when two way communications might mean failure for the person giving the directives. No one can question your decision or directive if you never allow them to talk.</p> |                |

### Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | CLASS ACTIVITY |
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| <p>(2) when you want to protect your "power" as a sender of communications which might then allow you to blame someone else if things don't work out.</p> <p><u>Example:</u><br/>"I told you to put in 3 more pans at 11:30 so we wouldn't run out! Why didn't you do it?"</p> <p>(3) when you have little time since one way communication is faster.</p> <p><u>Example:</u><br/>"Get out of the kitchen!" (...if the kitchen was on fire for example)</p> <p>(4) when you want to have an orderly organized public image:</p> <p>(a) one way communication leaves a good impression on people if they observe such communication.</p> <p>(b) one way appears more business-like.</p> <p><u>Example:</u><br/>"At the end of the meeting, fold up your chairs and place them against the north wall of the gym."</p> |                |

### Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

#### LESSON CONTENT

- (5) when you don't want mistakes recognized or pointed out publicly. If you make a statement or a request in public and it is not correct, no one will know it is wrong if you don't allow anyone else to speak.

Example:

"The food cost in our department dropped by 2 points this month which is the best in the district."

C. Personal Communications - On the Telephone

1. Foodservice managers/directors must use the telephone many times a day in the course of business. Calling in orders, asking substitute workers to come to work, scheduling deliveries, confirming meetings and a variety of other tasks are accomplished through use of the telephone.
2. Your telephone techniques can work for or against you, but a lack of good business telephone manners leaves a poor image in the minds of those you deal with on the phone.

#### CLASS ACTIVITY

Use Handout 13-3 to review some of the basic telephone techniques and manners expected of professional managers. Discuss with participants instances they have experienced where these techniques or manners were violated.



### Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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| <p>D. <u>Personal Communications - In the Written Form</u></p> <ol style="list-style-type: none"><li>1. Foodservice managers/directors use a variety of written communications in accomplishing their jobs.</li><li>2. It is important that all written communications you issue give the image you intend.</li><li>3. Many times you never have the opportunity to meet in person with the people that read your various written communications. Therefore it is very important that your written messages are accurate, and truly represent you and your department.</li></ol> <p>III. <u>Non-verbal Communications.</u> This type of communication includes all forms of communications that do not involve words. It includes things such as personal appearance, appearance of your office, and personal body language demonstrated.</p> <p>A. <u>Personal Appearance</u></p> <ol style="list-style-type: none"><li>1. How you dress and look as a professional foodservice person is a silent communication you give to everyone who comes in contact with you.</li><li>2. If your clothes or uniform are wrinkled and "less than neat" you provide a negative image to those around you.</li><li>3. If your shoes need polishing and your hair needs attention, it all reflects on your professional image.</li></ol> | <p>Use Handout #3-4 to review some of the basic techniques of written communications. After reading this handout together, list on the blackboard all the possible written communications used by the participants in accomplishing their jobs. Then ask participants to identify the types of written communications they would like to improve in their operations.</p> <p>An example might be to have the monthly menu sent home to parents printed or duplicated using an off-set process in order to eliminate the purple ditto menu presently being used.</p> |

Lesson 3: COMMUNICATION IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | CLASS ACTIVITY |
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| <p>4. You want your publics to see you as an organized, neat, coordinated, up-to-date manager so you must dress in an organized, neat, coordinated, up-to-date manner.</p> <p>5. Next time you have the opportunity, look at yourself in your "work clothes" in a full length mirror. Be objective in identifying areas where improvement is definitely needed.</p> <p>B. <u>Office Appearance</u></p> <p>1. The appearance of your office area is another silent communication which tells those who enter your office what kind of professional person you are.</p> <p>2. If your office is unorganized, how can the kitchen you supervise be organized? Your boss, the principal or parents who you deal with will notice the condition of your office. Can you quickly find the information someone requests from you or do you have to dig through various piles of papers and things stacked on your desk or on shelves?</p> <p>3. Next time you enter your office area, pretend it belongs to someone else. How would you rate the office on neatness and organization?</p> <p>C. <u>Body Language</u></p> <p>1. Body language refers to the way we silently communicate with our body motions and positions.</p> |                |

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Lesson 3: COMMUNICATIONS IN MANAGEMENT OF CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | CLASS ACTIVITY                                                                                                                                                                                                                                                      |
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| <p>2. It includes our walk, the way we hold our arms and hands, and the way we gesture.</p> <p>a. Do you sit up straight in a chair or sit side-ways or slouching down? Sitting up straight tells people that you are confident and professional. What does slouching or sitting side-ways tell you?</p> <p>b. Do you walk with a quick efficient step or do you walk with a lazy carefree gate? Discuss the image you get from each of these walking patterns.</p> <p>c. Do you give directives to employees with your hands on your hips? How do you think this makes your workers feel?</p> <p>d. Do you frequently sit or stand with your arms crossed, drawn tightly across your chest? This tells people that you want to be left alone and don't want to be bothered with their opinions. Arms in a more open position tells people that you want their communication, you want their ideas and comments.</p> | <p>Between now and the next lesson class try to observe styles of body language. Watch your principal or various teachers and report back to the class what you observed. Did you feel that the body language you observed was true to the person's life style?</p> |

## USING THE OPEA FORMULA FOR IMPROVED COMMUNICATIONS

### HANDOUT #3-1

#### OPEA Formula:

1. O = Opening  
Gain attention of listener, involve self-interest, state the problem or assignment, compliment the listener, offer a challenge, put the listener at ease, present a subject of common interest.
2. P = Point or Purpose  
Key idea you want to get across, state idea clearly and briefly, state advantages of your idea, state basically what this discussion is all about.
3. E = Evidence  
What proof can you offer to substantiate Step 2? Can you provide examples, testimony or statistics to support your point?
4. A = Action or Acceptance  
What action are you requesting? What end result do you hope to achieve? Restating the point (Step 2) may help strengthen your position.

#### SITUATIONS:

- A. Your annual sanitation inspection is due in about 3 weeks and you are going to have to assign additional cleaning tasks to all cooks in order to bring the kitchen up to the standard you feel is necessary. How would you talk to your employees about this as a group meeting?
- B. You are a new manager in this kitchen and notice immediately that no one ever follows the provided recipes which you know are good from your previous job assignment. You are going to talk to your head cook about the need to follow recipes from now on. How would you discuss this?
- C. You have been repairing your old deck ovens for several years. When operating they work but you would like money from your business manager for new convection ovens. How would you approach him with your request for \$5000 for new ovens?
- D. You are a new manager in this kitchen and you notice how sloppy the cooks and counter servers are in their appearance and personal hygiene. You have called a meeting of all employees to discuss this problem and to ask them to improve in this respect. How would you discuss this with these employees?



## ONE AND TWO WAY COMMUNICATION

### HANDOUT #3-2

Ask participants to pair off in couples and adjust their chairs so that they are sitting back to back. The person with the first name closest to "A" in the alphabet will be called #1; the other person #2. Person #1 should be sitting at a desk or table for this exercise, and will be the receiver in this exercise. Person #2 will be the sender.

To begin, give each #1 person 10 dominoes. Give person #2 the picture of the domino arrangement on page two of this exercise. Sitting in a back-to-back position, complete the two steps in this exercise as described below.

#### Step 1

Person #2 is to describe to #1 how to arrange the dominoes so they will look like the diagram provided. One way communication is to be used which means that #2 does all the talking. Person #1 is only to receive directives about how to arrange the dominoes and must do the best job he/she can without asking any questions of #2. When #2 has finished describing how to arrange the 10 dominoes-compare the provided diagram with the actual domino arrangement. How accurate were the dominoes arranged when you couldn't ask questions?

#### Step II

Quietly, ask person #2 to turn the domino diagram upside-down and repeat this exercise. However, this time Person #1 may ask any questions and may clarify directives that are not understood. This exemplifies two way communication. When person #2 has finished describing how to arrange the 10 dominoes, compare the diagram with the actual domino arrangement. How accurate were the dominoes arranged when you could ask questions?

As a group, discuss the following questions together about this exercise.

1. Is one way or two way communication faster?  
Did you do step I or step II faster?
2. Is one way or two way communication better for accuracy?  
Which domino arrangement was closest to the diagram?
3. Did the receiver (person #1) prefer one way or two way communication?  
Which way made him/her feel more confident about what was to be done?
4. Did the sender (person #2) prefer one way or two way communication?  
Which way made him/her feel more confident?

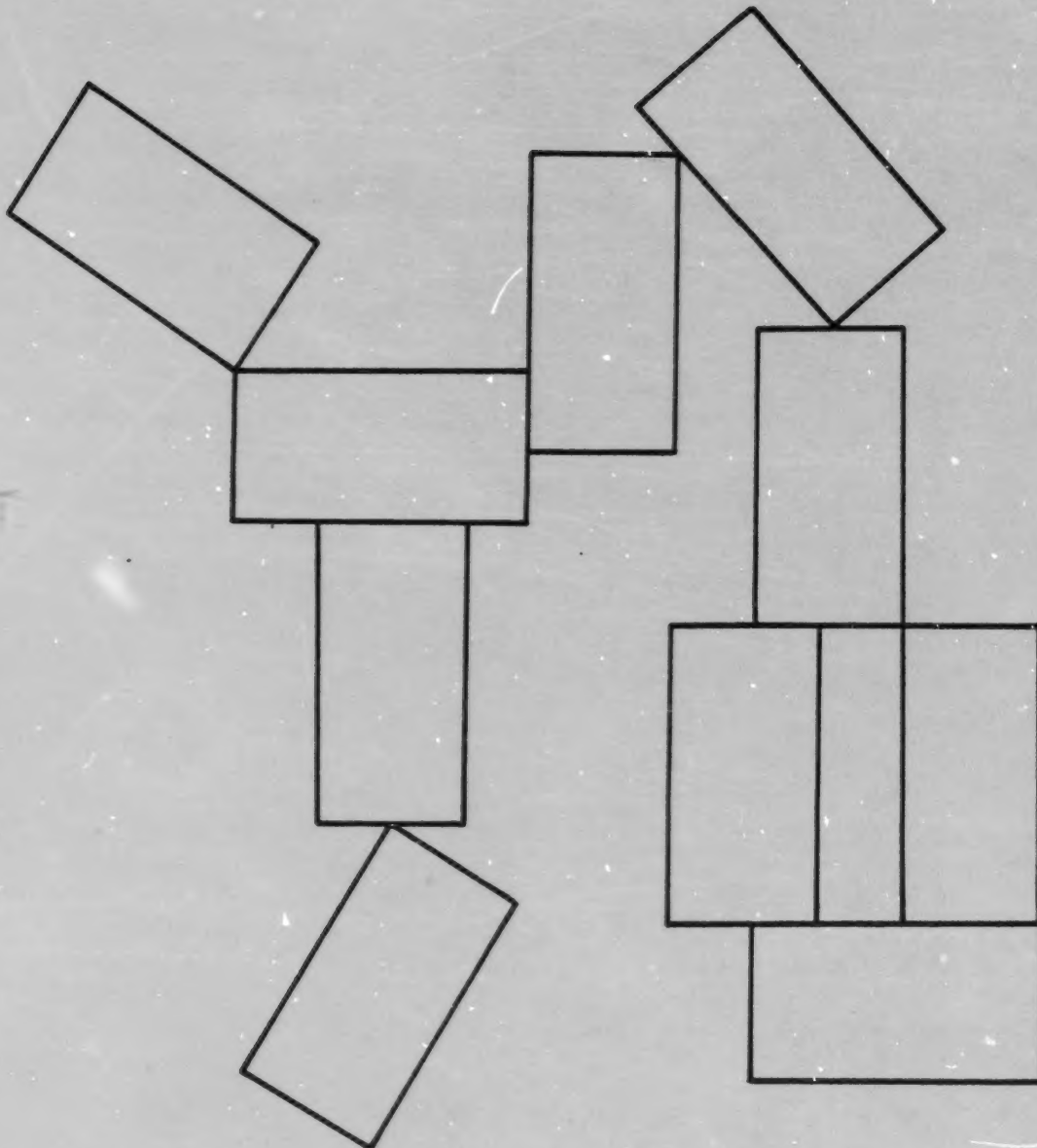
HANDOUT #3-2 cont.

5. Is one way or two way communication more orderly in appearance and general impression?
6. Ask Person #1, in general, how did you feel in each of these situations (Steps I & II)?
7. Ask Person #2, in general, how did you feel in each of these situations (Steps I & II)?



ONE AND TWO WAY COMMUNICATION-DOMINO DIAGRAM

HANDOUT #3-2, page 3



## PROFESSIONAL TELEPHONE TECHNIQUES

### HANDOUT #3-3

1. Identify yourself. Be sure the person at the other end of the line knows who you are and what you are calling about. This should be done even if you know the person you are calling very well. You should never assume that they will always recognize your voice.
2. Speak into the mouthpiece of the telephone. Too often people are careless and talk to the wall or to their desk instead of to the phone. Don't make your listener strain to hear and understand you.
3. Don't eat on the phone. The phone magnifies noises, so avoid eating or drinking. It sounds ugly! Don't chew a pencil or other object either because your pronunciation will distort your speech.
4. Be sure you have the right number. If you have rung the wrong number and not bothered to identify the other party, you will waste everybody's time and you will be embarrassed when you discover your error.
5. Listen to yourself. Since you do not have the benefit of seeing how your listener is reacting to you, you should check your own style. Are you hogging the conversation? Are you rambling on pointlessly? Are you ignoring the other person?
6. Always be considerate. The phone lets you interrupt others. Be sure it is convenient for them to talk when you call. Arrange to talk at another time if it is not convenient to talk when you first call.
7. Don't give the phone preference. The person in your office deserves your undivided attention. If you are interrupted by a phone call, arrange to call back at another time.
8. Don't let people around you interrupt your conversations. When your attention is divided, you are being rude to both persons but especially to the person at the other end of the phone.
9. Is the line clear? Before you pick up the phone and start dialing be sure no one is on an extension.
10. State your case. After the opening pleasantries, explain your reason for calling. Small talk about the weather or recent family events can develop later if both of you have the time and inclination.

Adapted from The Communicator, by A. Coffin, 1975, American Management Associations, New York, NY.

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## PROFESSIONAL TECHNIQUES FOR WRITTEN COMMUNICATION

### HANDOUT #3-4

1. Be neat. The overall appearance of your written communication is very important. Use good paper, neat typing or writing and an uncrowded layout which all contribute to a positive impact on the reader. Sloppy looking, crowded pages turn a reader off.
2. Avoid abbreviations and initials. Say what you mean and don't leave it up to the reader to guess what you have on your mind. Using "etc." is the biggest offender.
3. Grab the reader at the beginning. Tell the reader immediately why you are writing and then expand into whatever detail is necessary.
4. Don't use big or technical words. In direct personal conversation you get a chance to react and clarify ideas if your listener looks confused. In writing you may lose your reader early if you get too technical.
5. Reread your letter or memo at least once. Rewrite it as many times as necessary to be sure that it is free of confusion and is clear.
6. Be modest. Try not to use too many "I's" in your writing. They draw the reader's attention to the person and away from the ideas. Also, it is better to phrase things so as to build up the reader's ego rather than your own.
7. Ease into bad news. If you can get your reader's sympathy or cooperation before you have to announce bad news or a problem, you will have him working with you, not against you.
8. Be right with names. People's initials and titles. Misspellings or incorrect references are a personal affront. If you antagonize your reader this way, you will lose the very first round.
9. Don't be lazy. When in doubt, use your dictionary and also check your facts. Be sure you are using the right words, that you know what they mean and how to spell them.
10. Don't be cute. Avoid tricky spellings that only confuse and distract the reader. Spell it light, not lite and through, not thru.
11. Don't scare the reader off. Most readers' enthusiasm for written communication varies in inverse proportion to the number of pages. The longer your communication, the better the chances are that it will go to the bottom of one of those stacks of papers on his desk.

PROFESSIONAL TECHNIQUES FOR WRITTEN COMMUNICATION

HANDOUT #3-4, page 2

12. Be sure the reader knows who said what. Minimize the use of he, she, they and we. Your message is always much clearer if you are specific and use a person's name.
13. End on a positive note. Always close a written communication the same way you would end a direct personal conversation. It cements your message and leaves a good impression.

Adapted from The Communicator by A. Coffin, 1975, American Management Associations, New York, NY.

FOR MANAGERS/DIRECTORS

Lesson 4

TOOLS FOR MANAGING HUMAN RESOURCES

A. GOAL OF THIS LESSON

The goal of this lesson is to outline tools managers may use for effective management of personnel or human resources.

B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. define an organization chart and discuss its uses,
2. define a job analysis and how it is done,
3. define and describe a job description and how it may be used,
4. describe the uses for job specifications, and
5. describe the contents and uses of a policy and procedure manual.

C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of handouts.
2. Contact any resource person(s) needed by telephone and in writing at least four weeks in advance of the scheduled lesson. The resource person(s) should be alerted to:
  - a. the target audience and background of participants including education and work experience.
  - b. the number of participants expected.
  - c. the goal(s) and purpose(s) of the lesson and topics to be covered.
3. Recontact the resource person(s) one week before class to confirm date, time and location of lesson. Determine if special equipment or other requirements will be necessary.
4. Write a note to the resource person(s) thanking them for their participation after completing the lesson.

5. Locate sufficient copies of an organization chart for your district to help in the discussion of organization charts with Handout #4-1.
6. Bring lined paper for Handout #4-2 and class activity.

D. KEY WORDS USED IN THIS LESSON

1. JOB ANALYSIS: A process of studying all phases of a job in order to develop job descriptions and job specifications.
2. JOB DESCRIPTION: A listing of the tasks which must be performed as a part of each job.
3. JOB SPECIFICATION: A listing of the personal qualifications a person should have in order to effectively perform a job.
4. ORGANIZATION CHART: A formal outline or diagram indicating the relationship between various positions within an organization.
5. PERSONNEL POLICIES: A statement which explains how personnel actions are to be conducted in order to provide consistent treatment of all employees. Usually a section in a departmental policy and procedure manual.
6. POLICY AND PROCEDURES MANUAL: A manual which describes in detail all departmental or district policies and how they are to be maintained and implemented. Sections in this manual usually include personnel, facility maintenance, food services, benefits and so forth.
7. LINE FUNCTIONS: Refers to jobs where direct supervision is involved. For example, telling a cook to make 10 gallons of chili is a line function of the manager/director.
8. STAFF FUNCTIONS: Refers to jobs where advising or offering suggestions to line managers occurs. Consultants usually carry staff functions and have little or no responsibility for the day to day operation of a foodservice department.

E. REFERENCES FOR ADDITIONAL INFORMATION

1. Lundberg, D. and J. Armatas. The Management of People in Hotels, Restaurants and Clubs. (see lesson 1)



2. Stokes, John W. How To Manage a Restaurant. 1977., Wm. C. Brown, Dubuque, Iowa (Chapter 3).
3. Van Egmond-Pannell, D. School Foodservice, 1981, Second Edition, AVI Publishing Company, Westport, CT. (\$19.00).
4. West, B., L. Wood, V. Harger, and G. Shugart. Food Service in Institutions. Fifth Edition. 1977. John Wiley and Sons, Inc., New York (Chapter 6). (\$30.50).

F. SUGGESTED SOURCES FOR RESOURCE PERSONS

1. Local school principal or business manager for district to specify job relationships within the local district. (See first class activity)

## Lesson 4: TOOLS FOR MANAGING HUMAN RESOURCES

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>I. There are a variety of tools a manager/director may use to help in supervising the human resources available. These tools include an organization chart, job analysis, job description, job specification and policy and procedures manual.</p> <p>II. <u>Organization Charts</u></p> <p>A. An organization chart shows the lines of authority and the relationship of positions to each other.</p> <p>B. The organization chart shows where all school foodservice personnel performing different functions "fit" in the total school program and, more specifically, within the school foodservice program.</p> <p>C. The chart shows to whom each person in the program is directly responsible and provides information on the number of positions in the whole organization.</p> <p>D. The organization chart traces the line of formal authority and indicates who is responsible for what. Functions and positions are graphically presented by the use of blocks, circles and lines.</p> <p>1. Solid lines connecting various blocks indicate the channels of authority for line functions which includes activities such as getting the food made and distributed.</p> | <p>Using Handouts #4-1, discuss the differences in the two organization charts presented. Note the dotted lines indicating staff functions on chart B.</p> <p>Discuss how closely your district's organization matches one of these samples. If possible distribute the organization chart for your district and discuss the various levels on it. Enter the names of the people presently in those positions so that employees will become familiar with the names and their various responsibilities.</p> |

## Lesson 4: TOOLS FOR MANAGING HUMAN RESOURCES

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | CLASS ACTIVITY                                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>2. Advisory responsibility and various lines of communication in an organization are often shown by dotted lines which are staff functions. These functions are essentially advisory and/or supportive in nature. No direct supervision usually occurs in these relationships.</p> <p>E. A copy of the current organization chart for all new employees, with the names on it of the persons that they should know, is helpful in orientating new workers. It would be nice if your employees knew who the superintendent was if he should walk into your kitchen.</p>                                                                                                                                                                                                           | <p>If an organization chart does not exist in your district, attempt to draw one on the board using a local resource person for assistance. This might be a school principal or the business manager for the district.</p> |
| <p>III. <u>Job Descriptions and Job Specifications</u></p> <p>A. <u>Job Analysis</u> is the first step in collecting information for developing job descriptions or job specifications.</p> <p>1. A job analysis involves studying all phases of each foodservice job and breaking it down into small tasks or units.</p> <p>2. The job analysis is valuable for many reasons:</p> <ol style="list-style-type: none"> <li>it eliminates unnecessary jobs or parts of jobs.</li> <li>it makes possible the selection of more qualified personnel because management knows exactly what's needed for each job.</li> <li>it helps eliminate many problems because each job has assigned responsibilities.</li> <li>it is a tool to be used to better balance the work load.</li> </ol> | <p>Using Handout #4-2, discuss how a job analysis is actually prepared and recorded.</p> <p>Ask participants to write a job analysis for their own job using memory recall. Provide lined paper for this exercise.</p>     |

Lesson 4: TOOLS FOR MANAGING HUMAN RESOURCES

LESSON CONTENT

CLASS ACTIVITY

- e. it helps to establish realistic production standards because the manager knows exactly what is involved in each foodservice job.

B. Job Descriptions are clear-cut written definitions of exactly what tasks are to be performed in each job.

1. It lists the title and purpose of the job.
2. It usually identifies the supervisor of the job.
3. It gives a brief listing of the job's duties and responsibilities.
4. Job descriptions should be discussed with the employee who is expected to do the job. Giving the employee a copy of the job description is best.
5. Date all job descriptions for easy reference and updating.
6. Since the tasks assigned to a job do change from time to time, job descriptions should be reviewed annually.

C. Job Specifications indicate what kind of a person with what kinds of skills is required to do a particular job.

1. It will list the personal qualifications in an effort to match the right person to the right job.

Using Handout #4-3 as a sample, and the job analysis just written as a reference, write your own job description. Submit to instructor for review and comment.

Together review the sample of a job specification on Handout #4-4. Using Handout #4-5 ask each participant to prepare a job specification for his/her own job. Ask participants to share the job specification with the class.



## Lesson 4: TOOLS FOR MANAGING HUMAN RESOURCES

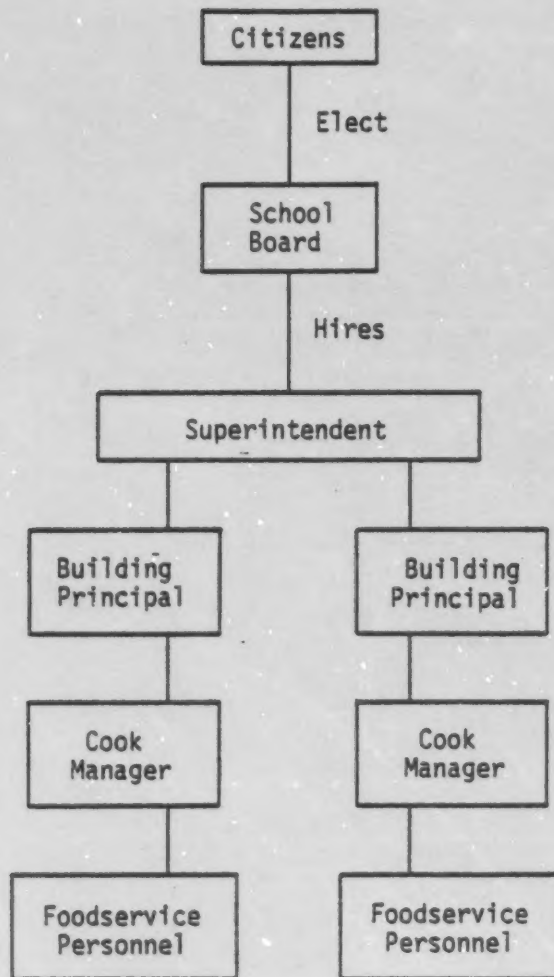
| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>2. It is a very helpful tool for those doing hiring of new employees. They can discuss the job specification with the applicant prior to hire in order to identify skills or requirements lacking in an applicant.</li> <li>3. Job specifications should be dated and reviewed annually for possible changes.</li> <li>D. Job descriptions and job specifications may be combined on one form.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                               |
| <p><u>IV. Policy and Procedures Manual</u></p> <ul style="list-style-type: none"> <li>A. A policy and procedures manual is a document that describes in detail all departmental and district policies required for effective operation of the district.               <ul style="list-style-type: none"> <li>1. It is divided into sections for each major functional area within the district. These functional areas might include foodservice, instruction, purchasing, personnel and facility maintenance.                   <ul style="list-style-type: none"> <li>a. Personnel policies included in this manual would discuss days off, sick days, tardiness regulations, vacation policies and fringe benefits.</li> <li>b. Foodservice policies might include the menu format, procedures used for selling meal tickets or collecting money, the role of the parent or student advisory boards, purchasing procedures, trucking schedules to satellite schools, inventory procedures, sanitation schedules and employee training guidelines.</li> </ul> </li> </ul> </li> </ul> | <p>Read through Handout #4-5 together so as to become familiar with a format typically used in policy and procedures manual.</p> <p>If possible ask participants to bring sample district manuals to share with class members. This may be a small employee handbook which may have been extracted from a larger district manual. Discuss the strong and weak points of any materials brought for review.</p> |

Lesson 4: TOOLS FOR MANAGING HUMAN RESOURCES

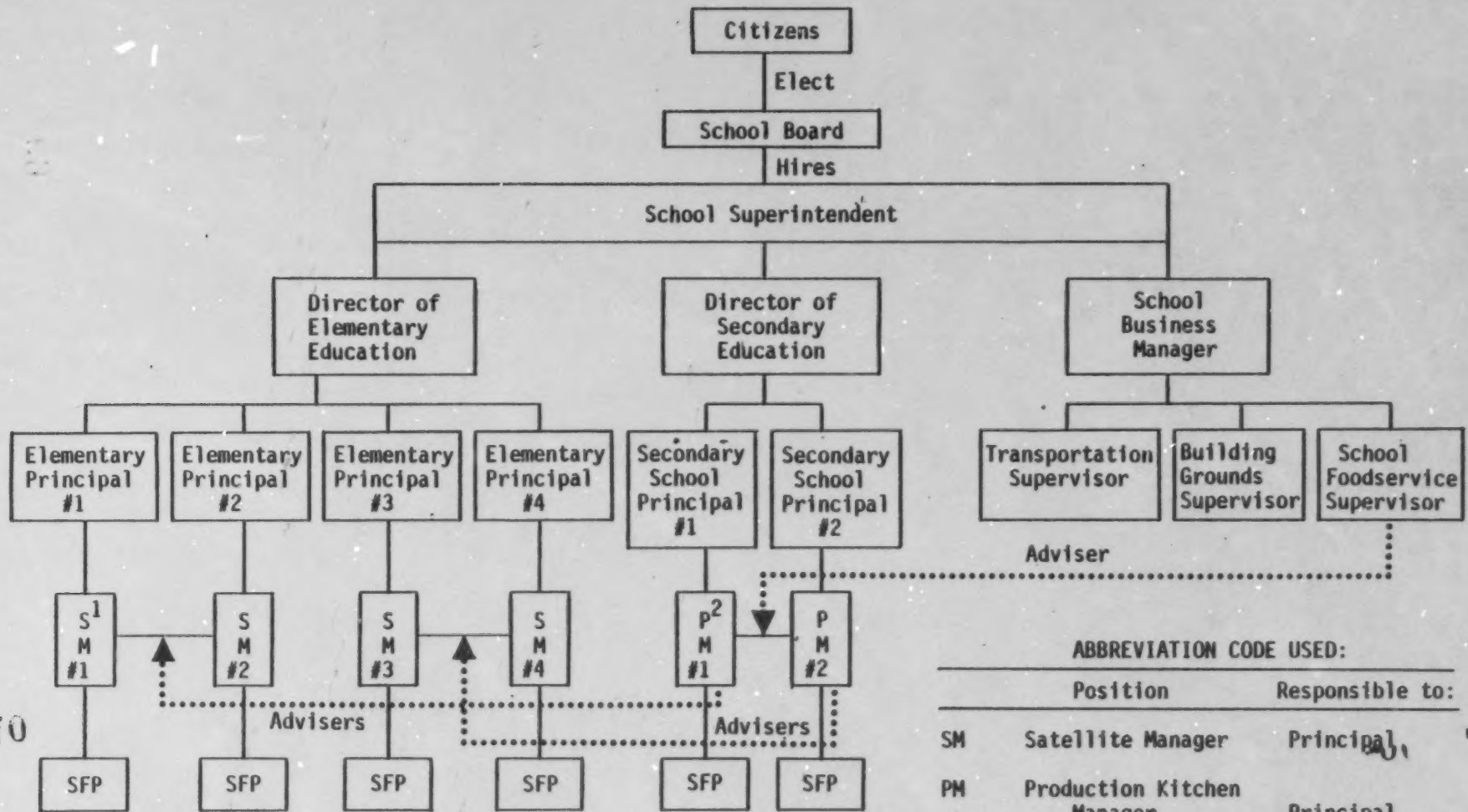
| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>2. The relationship between departments or functional areas may also be described in this manual to clarify the roles and responsibilities of each one.</p> <p>B. The purpose of a manual is to standardize procedures and operations throughout the district. A well written detailed manual should leave few issues unaddressed.</p> <p>C. Policy and procedures manuals should have every page dated (for easy reference and updating), should be in a 3 ring binder (for easy removal of out-dated pages) and should be easily accessible to all employees. Storing it in the back of the manager's desk drawer is of little help to anyone!</p> | <p>Working in pairs, ask participants to write the procedures used in one of the following policy statements:</p> <ol style="list-style-type: none"><li>1. closing the kitchen in June (end of year)</li><li>2. bad weather cancels school before lunch</li><li>3. satellite deliveries from high school to elementary school cannot be made for 1 day (perhaps due to weather)</li><li>4. selling milk or lunch tickets prior to meal</li></ol> |

HANDOUT #4-1  
SAMPLE SCHOOL FOODSERVICE ORGANIZATION CHARTS

A. In Small District



B. In Large District



ABBREVIATION CODE USED:

|     | Position                                | Responsible to:           |
|-----|-----------------------------------------|---------------------------|
| SM  | Satellite Manager                       | Principal                 |
| PM  | Production Kitchen Manager              | Principal                 |
| SFP | School Food Service Program & Personnel | Supervisor & Business Mgr |



HANDOUT #4-2  
HOW TO DO A JOB ANALYSIS

Analyzing a job is not a difficult undertaking. It merely requires that someone observe and make written notes on exactly what an employee does during each 15 minute interval on a shift. The following is a sample of a job analysis.

Name of Employee \_\_\_\_\_ Job Analyzed \_\_\_\_\_ Date \_\_\_\_\_

|       |       |
|-------|-------|
| 6:00  | 12:00 |
| 6:15  | 12:15 |
| 6:30  | 12:30 |
| 6:45  | 12:45 |
| 7:00  | 1:00  |
| 7:15  | 1:15  |
| 7:30  | 1:30  |
| 7:45  | 1:45  |
| 8:00  | 2:00  |
| 8:15  | 2:15  |
| 8:30  | 2:30  |
| 8:45  | 2:45  |
| 9:00  | 3:00  |
| 9:15  | 3:15  |
| 9:30  | 3:30  |
| 9:45  | 3:45  |
| 10:00 | 4:00  |
| 10:15 | 4:15  |
| 10:30 | 4:30  |
| 10:45 | 4:45  |
| 11:00 | 5:00  |
| 11:15 | 5:15  |
| 11:30 | 5:30  |
| 11:45 | 5:45  |
| 12:00 | 6:00  |

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HANDOUT #4-3

SAMPLE JOB DESCRIPTIONS-JOB SPECIFICATIONS IN SCHOOL FOODSERVICE

EXAMPLE 1

Title: School Foodservice Manager

Listing of important tasks:

1. Supervises, coordinates and evaluates work of all school foodservice employees in preparing and serving food and cleaning facilities and utensils in one production kitchen and all satellite centers served by that kitchen.
2. Assists school foodservice director in planning menus which meet nutritional and other objectives.
3. Estimates and develops weekly food and supply orders.
4. Keeps all required records.
5. Takes a monthly inventory of all food, supplies and equipment.
6. Directs activities of student workers.
7. Inspects school foodservice facility for safety and sanitation hazards and insures that all problems noted are corrected.
8. Helps to prepare or serve food in instances when other employees are not available (when emergencies arise).

Supervised by: School Foodservice Director

Supervises: School foodservice employees (cooks, servers, assistants, student workers).

General skills, knowledge, abilities:

1. Must have ability to supervise the work of others.
2. Must have knowledge of school foodservice program requirements.
3. Must have ability to complete reports on time.
4. Must have written and oral communication skills.
5. Must have considerable knowledge of quantity food production, storage and handling techniques.
6. Must have skill in using public relations techniques to promote school foodservice to school and nonschool groups.

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EXAMPLE 2:

A. Title: School Foodservice Director

B. Listing of important tasks:

1. Advises and coordinates work of school foodservice managers engaged in managing production and satellite kitchens.
2. Plans, with assistance of managers, menus to meet nutritional and other requirements.
3. Compiles food and supply purchase orders received from managers; develops product specifications, obtains price quotations; orders food and supplies.
4. Consults with school and district level administrative staff to develop policies and procedures for operating school foodservice programs in local schools.
5. Conducts ongoing management review activities to improve existing practices and services.
6. Compiles school records and develops reports requested by school district, state and federal authorities.
7. Conducts interviews, selects (or recommends) and assigns school foodservice employees.
8. Evaluates extent to which school foodservice managers meet objectives.
9. Assists school and district administrative staff in preparing and analyzing school foodservice budgets.
10. Presents reports, general information and otherwise discusses school foodservice programs at school board, faculty, public and other meetings.

C. Reports to: School Business Manager

D. General skills, knowledge, abilities:

1. Skill in motivating and supervising school foodservice managers.
2. Knowledge of school foodservice program regulations, policies, procedures.

EXAMPLE 2, cont.

3. Ability to relate school foodservice programs, through public relations techniques, to school and nonschool groups.
4. Knowledge of food production management techniques.
5. Knowledge of nutrition and nutrition education principles and application of these principles within the ongoing school programs.
6. Ability to develop food and supply purchase specifications and to purchase these items at best costs from purveyors.

EXAMPLE 3:

Title: School Foodservice Cook

Listing of important tasks:

1. Performs food production, service and/or cleanup tasks as requested by school foodservice managers.
2. Cleans and maintains school foodservice equipment and facilities.
3. Assists school foodservice manager with record keeping and inventory reports as requested.
4. Makes suggestions for improving food quality or general operation of school foodservice programs.
5. Operates equipment and performs work tasks in a safe and sanitary manner.
6. Performs other tasks as delegated by school foodservice manager.

Supervised by: School Foodservice Manager

Supervises: No personnel are supervised by the school foodservice cooks.

General skills, knowledge, abilities:

1. Knowledge of quantity food production, storage and handling techniques.
2. Ability to safely and properly operate large volume food production equipment.
3. Ability to understand oral and written instructions.
4. Ability to interact efficiently with other school foodservice and school personnel, students and the general public.



HANDOUT #4-4

SAMPLE OF JOB SPECIFICATION INFORMATION FOR A COOK

1. Job Title: First Cook
2. Hours Worked: 6:30 a.m. to 3:00 p.m., 5 days a week, 30 minute lunch period.
3. Supervisor: Foodservice Manager
4. Personal Requirements: Neat, clean; male or female
5. Education Qualifications: No degree required but must be able to read and do simple mathematics.
6. Experience Necessary: Cooking in a cafeteria or restaurant 6 months desirable but not required.
7. Knowledge and Skills: Knowledge of basic principles of quantity food preparation; ability to adjust recipes and follow directions; ability to plan work.
8. Physical Requirements: Standard physical examination.
9. Other Special Qualifications (driver's license, health certificate, etc): health card from City of Detroit.
10. Personality Requirements: Ability to work under pressure to meet time deadlines, and initiative on the job.
11. References Required: Two work and two personal references.
12. Promotional Opportunities: To foodservice supervisor.
13. Advantages and Disadvantages of job: good location, pleasant working environment, good job security, excellent benefits.

HANDOUT #4-5

INFORMATION NEEDED FOR A JOB SPECIFICATION

1. Job Title -
2. Hours Worked -
3. Supervisor -
4. Personal Requirements -
5. Educational Qualifications -
6. Experience Necessary -
7. Knowledge and Skills -
8. Physical Requirements -
9. Other Special Qualifications (driver's license, health certificate, etc.)
10. Personality Requirements -
11. References Required -
12. Promotional Opportunities -
13. Advantages and Disadvantages of job -

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HANDOUT #4-6

SAMPLE PAGE FROM POLICY AND PROCEDURES MANUAL

Section II - Personnel

Policy: Filling Vacant Positions

Procedure:

1. In accordance with current union contract provisions, post notice of a job vacancy for 2 weeks on employee bulletin board in every kitchen. Include the requirements for the job at the posting site, and the procedures for applying, including:
  - a. where applications are available, and
  - b. where should completed applications be turned in or sent
2. Encourage all qualified current workers to apply for the job.
3. Interview all who apply and determine the best candidate using the job specification and job description as references.
4. Offer the job to the most qualified candidate.

September, 1980

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Lesson 5

PROGRESS TEST FOR LESSONS 1, 2, 3 and 4 ON PERSONNEL MANAGEMENT

A. GOAL OF THIS LESSON

The goal of this lesson is to review the most important aspects of the past 4 lessons, by administering the following Progress Test.

B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. summarize and review the important information presented in Lessons 1, 2, 3 and 4.
2. emphasize the most important points presented in Lessons 1, 2, 3 and 4.
3. identify subject areas in which participants desire or need further study and practice.

Note: The Progress Test should NOT scare or humiliate participants or be used as a device to keep them from continuing on with further lessons. There is no minimum score of success. This is an exercise or learning activity just as the other lessons have been.

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C. INSTRUCTOR PREPARATION FOR CLASS PROGRESS TEST

1. The time allowed for this lesson is approximately 25 minutes.
2. Duplicate sufficient copies of Progress Test.
3. How the Progress Test should be given:
  - a. Pass out copies of the Progress Test to each participant.
  - b. Provide pens or pencils for those who may not have brought their own.
  - c. Explain that the reason for this Progress Test is to review the important information presented in the past four lessons.
  - d. Briefly go through the test together to explain the different kinds of questions to be sure that all participants know what they need to do for each question.
  - e. Allow approximately 25 minutes for participants to complete the test.
  - f. Allow participants to keep their own test while answers are discussed.
  - g. State aloud which answer(s) are correct for each question.
  - h. Discuss how to change false statements so they read "true".
  - i. Lead a class discussion relating to reasons why other choices, if given, are incorrect. Ask participants to give examples of the application of each question to their school foodservice situation.
  - j. Allow any participants who desire to do so to retake the test on their own time.
  - k. Provide additional references on any topic to participants who desire further information.



LESSON 5

D. PROGRESS TEST - Covers Lessons 1, 2, 3 and 4

MULTIPLE CHOICE

Circle the correct answers in the questions below.

1. Management can be defined as:
  - a. achieving goals
  - b. a system
  - c. using resources
  - d. all of the above
2. The management process includes the functions below except:
  - a. directing
  - b. planning
  - c. representing
  - d. scheduling
3. Directing is a complex management function which may include:
  - a. discussing and deciding
  - b. supervising and coordinating
  - c. talking and listening
  - d. telephoning and filing
4. The decision making process includes all of the steps below except:
  - a. evaluating each solution
  - b. evaluating the solution chosen
  - c. seeking all possible solutions
  - d. voting on the most popular solution
5. Pitfalls encountered during the decision making process may include all except:
  - a. delegating the decision to your boss
  - b. making a decision at the wrong time
  - c. not having accurate information to make a decision
  - d. selecting a solution that can't be implemented
6. A Theory X boss would:
  - a. offer choices to employee's to encourage self-direction
  - b. would keep a tight control on all workers
  - c. would give detailed explanations to workers
  - d. wouldn't bother to explain why directives were given

PROGRESS TEST - page 2

7. A Theory Y boss would:

- a. encourage creativity in employees
- b. encourage self direction in employees
- c. give out assignments 1 at a time with minimal explanations as to why
- d. let employees have a say in making work decisions

ORDER THE FOLLOWING STATEMENTS

8. When giving directives or orders according to the OPEA format, the correct order is (number choices in correct order)

- ☐ a. Point or purpose
- ☐ b. Opening
- ☐ c. Action or acceptance
- ☐ d. Evidence

MULTIPLE CHOICE

9. One way communication is preferred:

- a. all the time
- b. when speaking to small groups
- c. when you have little time to explain
- d. when you want to make sure the other person understands

10. Non-verbal communications may include:

- a. the appearance of letters and memos you write
- b. the appearance of your office or work space
- c. the way you walk and gesture
- d. your personal appearance and dress

11. Good telephone communications include:

- a. identifying yourself at the beginning of every conversation
- b. making a personal call to a fellow manager during working hours as long as you have the time
- c. not eating while talking on the phone
- d. not letting people entering your office take preference over the person you are talking to on the phone

12. Good written communications may include:

- a. announcing any bad news at the start so reader knows your intent
- b. heavy use of the word "I" so the reader knows the ideas are yours
- c. not using cute or technical words which may turn the reader off
- d. using abbreviations such as "etc" so you can keep things brief

13. An organization chart:

- a. gives the history of the organization
- b. doesn't show lines of authority or the relationship between jobs
- c. should be distributed to all employees
- d. all of the above

14. Select the true statement below:

- a. a job specification is the first step in preparing a job description
- b. a job analysis identifies all phases and aspect of a job
- c. a job description lists all tasks to be performed on a job
- d. a job specification indicates the skills and personal qualifications needed for a job

15. The Policy and Procedures Manual:

- a. is description of who is employed in each department
- b. is a description of all departmental and district policies
- c. should be accessible to all employees
- d. should be kept only by the head of the department for reference

LESSON 5 - ANSWER KEY FOR PROGRESS TEST - Lessons 1, 2, 3 and 4

1. d
2. a, b, c
3. b
4. a, b, c
5. a
6. b, c, d
7. a, b, d
8. 1 = b, 2 = a, 3 = d, 4 = c
9. c
10. b, c, d
11. a, c, d
12. c
13. d
14. b, c, d
15. b, c

A. GOAL OF THIS LESSON

The goal of this lesson is to explain the general guidelines which may be used in staffing foodservice programs.

B. PURPOSE OF THIS LESSON

After completing this lesson the participants should be able to:

1. identify factors that influence staffing needs,
2. identify results of over- and understaffing,
3. calculate productivity rates of meals per labor hour for a given foodservice operation, and
4. evaluate present staffing pattern for possible alterations.

C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of handouts.
2. Send survey (Handout 6-1) to participants 3 weeks (minimum) in advance of scheduled class and ask for their return in 1 week. Review and summarize survey results to use in class activity discussion. Calculate meals per labor hour for each school if possible.
3. Arrange for a blackboard.



#### D. KEY WORDS USED IN THIS LESSON

1. PRODUCTIVITY: A measure of the efficiency of employees. Generally, the higher the productivity rate (for example, meals per labor hour), the greater the efficiency of food-service workers and the lower the labor cost per meal. Meals per labor hour determined by dividing total meals served daily by total daily labor hours.
2. STAFFING: The process of determining the number of labor hours needed to operate the program as efficiently as possible without sacrificing goals.
3. COOK FROM SCRATCH: Preparation method where most menu items are prepared from a combination of recipe ingredients and require a basic knowledge of cooking and food preparation.
4. CONVENIENCE FOODS: Completely prepared foods requiring only end-heating and/or portioning. Examples would be breaded chicken or fish, cakes or pies, salad dressings or ravioli.
5. BUFFET STYLE SERVICE: Method of service where customer selects foods from choices offered and regular counter serving personnel are not required.
6. FAMILY STYLE SERVICE: Method of service where large bowls or platters of foods are passed around table for customers to help themselves.
7. SCATTER SYSTEM COUNTER ARRANGEMENT: Serving counter arrangement where each general food area is separate such as hot foods, salads, desserts and beverages. Customers do not stand in a single line but go directly to the specific serving counter they want. This system eliminates long customer lines and increases the number of customers served per minute.

#### E. REFERENCES FOR ADDITIONAL INFORMATION

1. Lundberg, D. and J. Armatas, The Management of People in Hotels, Restaurants, and Clubs. (see lesson 1).
2. Van Egmond-Pannell, D. School Foodservice. (see lesson 4).

## Lesson 6: GUIDELINES FOR STAFFING FOODSERVICE PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>I. <u>Introduction to Staffing School Foodservice Programs</u></p> <p>A. One of the most important responsibilities of a foodservice manager/director is to determine how many employees (labor hours) are needed for the school foodservice programs to operate efficiently on a day-to-day basis.</p> <p>B. If a program is understaffed, it may lead to:</p> <ol style="list-style-type: none"><li>1. inadequately planned meals or menus,</li><li>2. poorly prepared, sloppy meals, or</li><li>3. overworked employees.</li></ol> <p>C. If a program is overstaffed, it may lead to:</p> <ol style="list-style-type: none"><li>1. an inefficiently run department,</li><li>2. high labor costs, or</li><li>3. poor worker motivation due to not having a full work schedule.</li></ol> <p>D. Foodservice programs cannot afford to be over or understaffed.</p> <p>II. <u>Staffing Requirements</u></p> <p>The number of labor hours required for the foodservice operation in an individual school will depend on many factors.</p> | <p>Prior to this class meeting ask participants to complete the survey on Handout #6-1 and return it to you so you can summarize the information and use it for discussion later in the class session.</p> <p>List on the chalk board other conditions or factors that may be present if a foodservice is understaffed.</p> <p>List on the chalk board other conditions or factors that may be present if a foodservice is overstaffed.</p> |

## Lesson 6: GUIDELINES FOR STAFFING FOODSERVICE PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                      | CLASS ACTIVITY                                                                                                                             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| <p>A. <u>The menu</u> - The variety and choices within a menu may impact on the number and distribution of labor hours. Increasing variety and number of menu choices does not necessarily result in an increase in labor hours.</p>                                                                                                                                                                | <p>Ask participants to identify other factors which may affect the number of labor hours needed in school foodservice programs.</p>        |
| <p>B. <u>The total number of meals</u> to be prepared and served each day.</p>                                                                                                                                                                                                                                                                                                                      | <p>Ask participants to identify situations where additions in menu variety or menu choices may add or subtract from total labor needs.</p> |
| <p>C. <u>The amount of prepared or convenience foods used</u> - Programs that generally "cook from scratch" most of the time, and seldom rely on convenience foods may require more staffing than other programs.</p>                                                                                                                                                                               |                                                                                                                                            |
| <p>D. <u>The scheduled meal period</u> -</p> <ol style="list-style-type: none"> <li>1. The number of customers to be served within a set time period. If all customers are served at once, more serving lines and more personnel may be required.</li> <li>2. The length of the serving periods. If food is to be available for long periods of time, more labor hours may be necessary.</li> </ol> |                                                                                                                                            |
| <p>E. <u>The amount and kind of equipment in the kitchen</u> - Some kitchens require fewer labor hours than other kitchens if equipment is:</p> <ol style="list-style-type: none"> <li>1. properly sized for total meal load,</li> <li>2. is cleaned and serviced according to manufacturer's instructions, and</li> <li>3. is new and efficient.</li> </ol>                                        |                                                                                                                                            |

## Lesson 6: GUIDELINES FOR STAFFING FOODSERVICE PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | CLASS ACTIVITY                                                                                         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <p>F. <u>The productivity and efficiency of workers</u> - A kitchen with workers who make the best use of their time can be operated with fewer employees. They may occur in kitchens where more training has occurred, or where closer supervision is given.</p> <p>G. <u>The number of Child Nutrition Programs in which the district participates</u> - A school which offers both breakfast and lunch programs may require more labor hours than a school offering only a lunch program.</p> <p>H. <u>Use of disposable or permanent ware</u> - The use of disposable dishes and flatware for dining service would require fewer labor hours in clean-up than operations using permanent ware.</p> <p>I. <u>Layout or arrangement of kitchen and serving equipment</u> - Well designed and organized kitchens and serving areas can usually operate with fewer workers than those poorly designed that require inefficient work patterns for employees.</p> <p>J. <u>Method of serving</u> - Serving methods such as buffet style, family style and other self-service options decreases total labor hours needed.</p> |                                                                                                        |
| <p>III. <u>Planning Staffing Patterns</u></p> <p>A. The wise distribution of labor hours throughout the work day should require both fulltime and part-time employees.</p> <ol style="list-style-type: none"> <li>1. Generally fulltime employees are those working 6 or more hours per day.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p>Discuss as a group the advantages and disadvantages of using part-time versus fulltime workers.</p> |

## Lesson 6: GUIDELINES FOR STAFFING FOODSERVICE PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | CLASS ACTIVITY |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>2. Part-time employees are those working less than 6 hours per day.</p> <p>B. Rather than use all fulltime employees, a manager/director may find it to be more cost effective to employ more part-time workers to fill the needs of the program. Determination of when workers are actually needed will be discussed later.</p> <p>C. Foodservice manager/directors may have to experiment in adjusting scheduled hours of workers in order to determine what is most efficient based on production and serving needs.</p> <ol style="list-style-type: none"> <li>1. Schedules are not permanent and should be annually reviewed, while considering any changes (additions and deletions) in program goals.</li> <li>2. Schedule changes require advance planning with sufficient notice given to workers.</li> </ol> <p>IV. <u>Things That Affect Staffing Patterns</u></p> <p>A. Schools serving a large number of meals require less labor per meal than schools serving a small number of customers.</p> <p>B. The number of meals produced per labor hour should increase with the experience and efficiency of the foodservice staff.</p> <p>For example, a group of new, less experienced cooks would require more time to prepare food products when compared to cooks who have been working several years.</p> | <p>92</p>      |



Lesson 6: GUIDELINES FOR STAFFING FOODSERVICE PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>C. Labor need may be greater in secondary schools due to a choice menu, the need for a variety of menu items, longer serving periods or more serving lines.</p> <p>D. Productivity rates should average from 15 to 19 meals per labor hour in foodservice operations using on-site food preparation systems. Productivity rates may be higher (20 to 28 meals per labor hour) in some centralized satellite operations.</p> <ol style="list-style-type: none"> <li>1. This productivity rate is very useful when operations are analyzed and found to be <u>greatly</u> at variance with the state standards. <ol style="list-style-type: none"> <li>a. An operation producing 15.0 meals per labor hour is not a great deal less efficient than one producing 15.8 meals per labor hour.</li> <li>b. However, an operation producing only 8.0 meals per labor hour should be studied because there may be problems which could be corrected.</li> </ol> </li> <li>2. As an individual foodservice manager/director, the best use of your productivity rate may be to compare it to the productivity rates of 3 or 4 other schools similar to yours in both size, programs offered and production methods used.</li> <li>3. If a suitable comparison is unavailable, it will be necessary to do your own job analysis for each position.</li> </ol> | <p>Discuss why productivity rates would be higher in a satellite type of food production system.</p> <p>Present results of Foodservice Questionnaires completed by participants prior to the class meeting. Compare productivity rates (meals per labor hour) for similar schools.</p> <p>Using the questionnaire and Handout #6-1 ask participants to review together the example given. Then have each participant fill in the blanks on Handout #6-3 for their own school.</p> |

Lesson 6: GUIDELINES FOR STAFFING FOODSERVICE PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | CLASS ACTIVITY                                                                                                                                                                                                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>V. The next step is to evaluate your present staffing patterns.</p> <ul style="list-style-type: none"><li>A. Be objective and think of the schedule as a new manager/director might do.</li><li>B. It may be difficult to imagine doing things at a different time or in a different order but your employees may offer helpful suggestions.</li></ul> <p>VI. All schools and districts are concerned with costs.</p> <ul style="list-style-type: none"><li>A. This means exercising control to pre-determined budget levels, and in some cases having to reduce costs from previous levels due to decreased revenues.</li><li>B. Your ability to offer present services with a reduced staff takes careful, thoughtful planning on the part of management.</li></ul> <p>VII. Alternate production and serving patterns may be necessary to meet objectives but input and planning from workers and others will make it a successful program.</p> | <p>Review Handout #6-4 together as an example of a staffing pattern review. Then ask each participant to complete Handout #6-5 for their own school. Ask participants to share their results with the class.</p> |

HANDOUT #6-1  
Foodservice Questionnaire

Please complete the questions below and return to sender within one week. Your answers will be very helpful during discussions of staffing in our next foodservice training class.

1. Type of school and enrollment

elementary  
middle or junior high  
high school  
other \_\_\_\_\_

(specify)

enrollment

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Foodservice programs offered:

\_\_\_\_ lunch only  
\_\_\_\_ breakfast and lunch  
\_\_\_\_ other \_\_\_\_\_

(specify)

3. Average number of meals served per day

breakfast \_\_\_\_\_  
lunch \_\_\_\_\_  
other \_\_\_\_\_  
TOTAL \_\_\_\_\_

4. Unique services provided such as:

\_\_\_\_ family style service  
\_\_\_\_ salad bar  
\_\_\_\_ fast food line (a la carte)  
\_\_\_\_ scatter system counter arrangement

5. Daily staffing levels:

total hours of full-time workers \_\_\_\_\_  
total hours of part-time workers \_\_\_\_\_  
total hours per day \_\_\_\_\_

DETERMINING PRODUCTIVITY RATES  
(MEALS PER LABOR HOUR)

HANDOUT #6-2

Because labor rates vary from district to district, the best way to compare productivity is to compute the number of labor hours used in the school foodservice operation for food production, service and cleanup tasks. The total number of labor hours spent can be divided into the total number of meals produced to determine the meals per labor hour, called the productivity rate. \*The greater the number of meals produced per labor hour, the more productive the school foodservice program.

STEPS TO COMPUTE PRODUCTIVITY:

- A. Count the time spent by all school foodservice employees including fulltime, part-time, adults, students, paid or volunteer.
- B. Compute the time separately for each foodservice program if possible. For example, try to calculate breakfast hours separately from lunch hours.
- C. Complete the form below. (SAMPLE)

|                                                                   |              |                     |             |
|-------------------------------------------------------------------|--------------|---------------------|-------------|
| Meal Period:                                                      | <u>Lunch</u> | Meals Served Daily: | <u>448</u>  |
|                                                                   |              | name                | hours daily |
| 1. Administrative Cook/Manager/<br>Director-(Supervisors on Site) | <u>Cora</u>  | <u>8</u>            |             |
|                                                                   |              |                     |             |
|                                                                   |              |                     |             |
| 2. Full-time Employees<br>(non-supervisory)                       | <u>Jane</u>  | <u>7</u>            |             |
|                                                                   | <u>Ethel</u> | <u>7</u>            |             |
|                                                                   |              |                     |             |
|                                                                   |              |                     |             |
| 3. Part-time Employees                                            | <u>Mary</u>  | <u>4</u>            |             |
|                                                                   | <u>Doris</u> | <u>3</u>            |             |
|                                                                   |              |                     |             |
|                                                                   |              |                     |             |
| 4. Student Workers                                                | <u>Bill</u>  | <u>1.0</u>          |             |
|                                                                   | <u>Sue</u>   | <u>1.5</u>          |             |

4. Student workers

|                |           |
|----------------|-----------|
| <u>Jerry</u>   | <u>.5</u> |
| <u>Herbert</u> | <u>.5</u> |
| <u>Hel</u>     | <u>.5</u> |

5. Other personnel/volunteers

|       |       |
|-------|-------|
| _____ | _____ |
| _____ | _____ |

D. Total all the hours in the right column.

Total Daily Labor Hours 448 (B)

E. To determine the productivity rate, take the number of meals served daily (item "A" above in Step 3) and divide it by the total number of daily labor hours (from Item "B" in Step 4)

$$\text{Productivity Rate} = \frac{\text{Total meals served daily (A)}}{\text{Total Daily Labor Hours (B)}}$$

$$\text{Productivity Rate} = \frac{448}{32} = 14 \text{ meals/labor hour}$$

This means that for each labor hour spent in meal production, service and clean-up, 14.0 meals are produced.



DETERMINING PRODUCTIVITY RATES  
(Meals Per Labor Hour)

HANDOUT #6-3

To determine the productivity rate for your school, complete the form below using the same steps outlined in Handout #6-2.

Meal Period \_\_\_\_\_

Meals Served Daily \_\_\_\_\_

|                                            | name  | hours daily |
|--------------------------------------------|-------|-------------|
| 1. Administrative<br>Cook/Manager/Director | _____ | _____       |
|                                            | _____ | _____       |
| 2. Fulltime Employees                      | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
| 3. Part-time Employees                     | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
| 4. Student Workers                         | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
|                                            | _____ | _____       |
| 5. Other Personnel/Volunteers              | _____ | _____       |
|                                            | _____ | _____       |

Total Daily Labor Hours \_\_\_\_\_

Productivity Rate \_\_\_\_\_ (Total meals daily ÷ total daily labor hours)

## STAFFING PATTERN EVALUATION

### HANDOUT #6-4

Work schedules or staffing patterns are seldom changed. Managers/directors frequently "inherit" a schedule and seldom evaluate production and service needs carefully to see if hours can be reduced, or if workers can be scheduled more effectively.

Look at the sample staffing pattern evaluation on page 3 of this handout. Names of employees have been written in according to their main function. Notice that Ethel spends time in production as well as in another area (cashiering). Present work shifts are indicated by square brackets on line "A." Note that the dots between hours indicate quarter hours. An asterisk (\*) indicates a worker is assigned to more than 1 position so may be on the evaluation sheet in 2 places (see Ethel). After all work shifts have been "bracketed" on line A of the schedule, ask yourself the questions below. Review each worker's present schedule of hours on line "A." Indicate on line "B" for each worker, possible schedule changes or reductions that you feel might be possible. Put an "X" on line "B" to indicate such changes, as was done on the sample schedule for both production employees. June and Ethel each have an "X" on line B indicating that their schedules could be changed at either the beginning of their shift, or at the end. By decreasing June and Ethel's schedule by 1 hour daily, and decreasing Mary from 4 hours to 3 hours daily, the productivity rate for this operation increased from 14 to 15.44 meals per labor hour. This is a substantial increase for a small department such as this one.

### Questions

1. Do cooks have to start as early as they now do?

Are all cooks busy from the time they report until the line opens?

Do all cooks have to start at the same time?

A lead or first cook who opens and organizes work for other cooks may be a more efficient schedule. Also, if all cooks begin at the same time there may be a tendency to have coffee and visit at the beginning of the shift. This activity may be costing you up to 30 minutes or more per employee per day.

2. Are all fulltime workers really busy the first 2 hours and the last 2 hours of their shift?

Could any fulltime positions be reduced to part-time?

3. Do all serving personnel start at the same time?

Can they be staggered where one person sets-up a line and other servers report for work just before the line opens?

MSU-NET  
FSHN/81

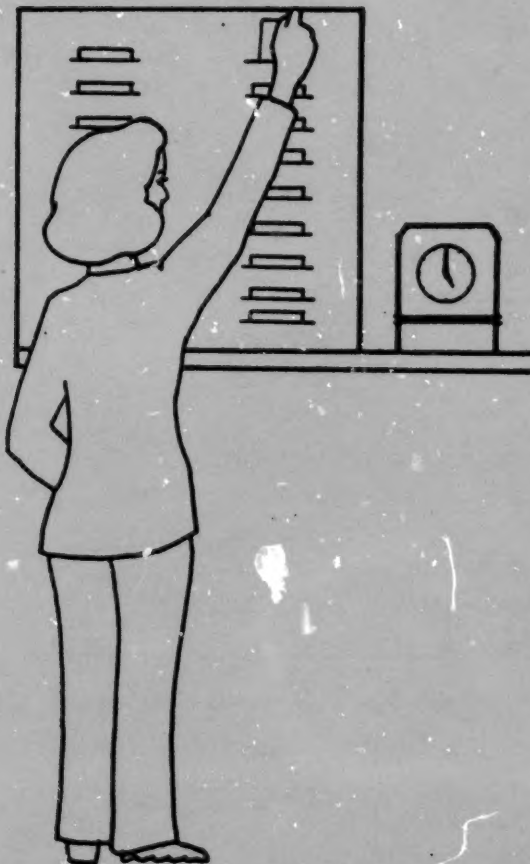
HANDOUT #6-4 cont.

Are all cooks needed in the kitchen to prepare back-up foods during the meal period, or could one or more be assigned to work on the serving line pre-preparation for the next day?

4. Are cashiers assigned other duties before and after the line is open?
5. Do dishroom and cleaning personnel report for work earlier than needed?

Ask yourself: as the manager/director, are you fully aware of the work load involved for each job and how long it really takes to complete tasks?

Hopefully this evaluation will help you identify areas where change may be possible in your present employee work schedule. Make the decision to try some of these changes for a month at your school to see if they will work.



HANDOUT #6-4, page 3  
STAFFING PATTERN EVALUATION

(To use in evaluation of your staffing pattern)

| Production Employees        | Time Schedule by Quarter Hours |   |   |   |      |    |    |    |      |   |   |   |
|-----------------------------|--------------------------------|---|---|---|------|----|----|----|------|---|---|---|
|                             | a.m.                           |   |   |   | noon |    |    |    | p.m. |   |   |   |
| A. <i>June</i>              | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Ethel*</i>            | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| Serving Employees           |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Doris</i>             | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Mary</i>              | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Mel</i>               | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Harriet</i>           | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| Cashiering Employees        |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Ethel*</i>            | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| Clean-up/Dishroom Employees |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Bill</i>              | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Jerry</i>             | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A. <i>Sue</i>               | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |
| A.                          | 5                              | 6 | 7 | 8 | 9    | 10 | 11 | 12 | 1    | 2 | 3 | 4 |
| B.                          |                                |   |   |   |      |    |    |    |      |   |   |   |



HANDOUT #6-4, page 4

|                    |                                                          |
|--------------------|----------------------------------------------------------|
| Other<br>Employees |                                                          |
| A.                 | 5...6...7...8...9...10...11...12...1...2...3...4...5...6 |
| B.                 |                                                          |
| A.                 | 5...6...7...8...9...10...11...12...1...2...3...4...5...6 |
| B.                 |                                                          |
| A.                 | 5...6...7...8...9...10...11...12...1...2...3...4...5...6 |
| B.                 |                                                          |

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HANDOUT #6-5  
STAFFING PATTERN EVALUATION  
(To use in evaluation of your staffing pattern)

| Production Employees        | Time Schedule by Quarter Hours |   |   |      |   |    |      |    |   |   |   |   |   |   |
|-----------------------------|--------------------------------|---|---|------|---|----|------|----|---|---|---|---|---|---|
|                             | a.m.                           |   |   | noon |   |    | p.m. |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| Serving Employees           |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| Cashiering Employees        |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| Clean-up/Dishroom Employees |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |
| A.                          | 5                              | 6 | 7 | 8    | 9 | 10 | 11   | 12 | 1 | 2 | 3 | 4 | 5 | 6 |
| B.                          |                                |   |   |      |   |    |      |    |   |   |   |   |   |   |

HANDOUT #6-5, page 2

| Other<br>Employees |                                                          |
|--------------------|----------------------------------------------------------|
| A.                 | 5...6...7...8...9...10...11...12...1...2...3...4...5...6 |
| B.                 |                                                          |
| A.                 | 5...6...7...8...9...10...11...12...1...2...3...4...5...6 |
| B.                 |                                                          |
| A.                 | 5...6...7...8...9...10...11...12...1...2...3...4...5...6 |
| B.                 |                                                          |

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**A. GOAL OF THIS LESSON**

The goal of this lesson is to explain the techniques used to recruit and select foodservice employees.

**B. PURPOSE OF THIS LESSON**

After completing this lesson, the participants should be able to:

1. identify the preliminary steps a recruiter should take prior to an interview,
2. know a variety of sources where foodservice applicants may be located,
3. develop a well written newspaper advertisement for a cook's position,
4. know the reasons for checking references and how to do it,
5. recognize the importance of using a structured application form and how to interpret the information received on it,
6. relate the advantages of using a two step interview process,
7. list a variety of "do's and dont's" for the interview process, and
8. identify the tangible results you can expect from using good hiring practices.

**C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES**

1. Duplicate sufficient copies of handouts.
2. Contact any resource person(s) needed by telephone and in writing at least four weeks in advance of the scheduled lesson. The resource person(s) should be alerted to:
  - a. the target audience and background of participants including education and work experience

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- b. the number of participants expected
  - c. the goal(s) and purpose(s) of the lesson and topics to be covered
  3. Recontact the resource person(s) one week before class to confirm date, time and location of lesson. Determine if special equipment or other requirements will be necessary.
  4. Write a note to the resource person(s) thanking them for their participation after completing the lesson.
  5. Collect samples of advertisements from newspapers or other sources for various foodservice positions to use with Handout #7-1 in a class activity that demonstrate poorly written and well written advertisements.
  6. Obtain copies of employment application forms used in the district(s) attending the class.

D. KEY WORDS USED IN THIS LESSON

1. EMPLOYEE RECRUITMENT: The process of obtaining applicants for vacant positions or jobs.
2. EMPLOYEE SELECTION: The process of choosing and hiring from the available applicant the person best qualified for a job.
3. LABOR TURNOVER: The length of employment from hiring to separation. A low turnover rate indicates few openings with employees to stay on a job for a long time. A high turnover rate means there are frequent openings and employees do not stay on the job very long.

E. REFERENCES FOR ADDITIONAL INFORMATION

1. Glueck, William. Personnel - A Diagnostic Approach. (see lesson 1).
  2. Lundberg, D. and J. Armatas. The Management of People in Hotels, Restaurants, and Clubs. (see lesson 1)
  3. West, B., L. Wood, V. Harger, and G. Shugart. Food Service In Institutions. (see lesson 4)
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SUGGESTED SOURCES FOR RESOURCE PERSONS

1. Personnel Director for your district

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# Lesson 7: RECRUITING AND SELECTING EMPLOYEES FOR CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Good hiring of foodservice personnel is a <u>purchasing function</u> since you are purchasing labor. It should follow an organized process just as food purchasing should. Good hiring is an absolute necessity for a well run food service program and includes both the recruitment and the selection process.</p> <p><u>I. RECRUITMENT OF APPLICANTS</u></p> <p>A. Attract applicants who are good workers and who will stay with the school foodservice program.</p> <ol style="list-style-type: none"> <li>1. The cost of labor turnover is high, many times costing from \$350 to \$800 per lost employee. Thus it is important to find employees who will remain with the school foodservice program.</li> <li>2. A trial and error method of recruiting is not effective; neither can you hire "just anyone" and turn them into effective workers.</li> <li>3. The following techniques in recruiting and selecting employees should help you locate loyal and dedicated workers for your department.             <ol style="list-style-type: none"> <li>a. Know what you are looking for. Know specifically what positions are open and what those jobs entail.                 <ol style="list-style-type: none"> <li>(1) Review the job descriptions for any openings (see lesson 4) so the tasks and responsibilities of each position are clear to you before recruiting begins.</li> </ol> </li> </ol> </li> </ol> | <p>Request that a school district official responsible for hiring school foodservice personnel visit class to discuss:</p> <ol style="list-style-type: none"> <li>1. how applicants for school foodservice vacancies are recruited, and</li> <li>2. how applicants for vacancies are selected.</li> </ol> <p>108</p> |

# Lesson 7: RECRUITING AND SELECTING EMPLOYEES FOR CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>(2) Review the job specification for any openings (see lesson 4) so you know the general type of person who might be best suited for each position.</p> <p>(3) Review personnel already within the school foodservice system to see if any may be qualified to move into the open positions.</p> <p>(4) Identify future personnel requirements of the school foodservice program so you can plan ahead.</p> <p>b. Know where to look for applicants.</p> <p>(1) Friends or relatives of currently employed personnel may be available so tell present employees about job opening.</p> <p>(2) Newspaper advertisements may attract applicants. Announcements in neighborhood church newsletters may also be effective in locating applicants.</p> <p>(3) Public employment agencies are also possible sources of applicants such as MESC (Michigan Employment &amp; Security Commission).</p> <p>(4) Placement offices in school and colleges may also be contacted, especially for management position openings.</p> <p>(5) Physically and mentally handicapped persons may be qualified for certain school foodservice positions. With training they can be very effective, dependable workers. Contact vocational rehabilitation center for referral of qualified individuals.</p> | <p>Using Handout #7-1 ask participants to work in pairs to develop a sample advertisement to use in recruiting foodservice employees. Assign each pair a different kitchen position to write their ad about.</p> <p>For example, one pair would seek to hire a cook; another pair, a cashier or dishroom worker. Share the finished ads with each other.</p> |

# Lesson 7: RECRUITING AND SELECTING EMPLOYEES FOR CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | CLASS ACTIVITY |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>(6) Senior citizens may be qualified for certain foodservice jobs and two such persons might well fill one fulltime position with each working just 4 hours per day. Contact local senior citizen centers for qualified referrals.</p> <p>c. Get several applicants for each position</p> <p>(1) Try to fit the applicant with the jobs, <u>not</u> the job with the applicant. If possible hire a person with the skills needed to perform the job to help decrease job training costs.</p> <p>(2) Don't "overhire" a person with more education or skills than needed for the job openings you have unless you foresee openings in the near future for which this person might be better suited. The person may become bored or may be just filling in time until a different job becomes available.</p> <p>(3) Check all references of applicants</p> <p>a. Telephone reference checks are quick and specific</p> <p>b. Verify dates of previous employment and conditions for leaving</p> <p>c. Ask what kind of a worker the person was and if he/she would be rehired. Was the worker's performance on the job satisfactory?</p> | <p>110</p>     |

# Lesson 7: RECRUITING AND SELECTING EMPLOYEES FOR CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>B. Have job applicants complete an application form.</p> <ol style="list-style-type: none"> <li>1. An application form is used to secure information about applicants to determine if an applicant is qualified for the position.</li> <li>2. Questions on applications must not violate any of the provisions of the Civil Rights Act of 1964 or EEO (Equal Employment Opportunity) regulations.</li> </ol> <p>C. Study the information on application forms to determine the suitability of applicants.</p> <ol style="list-style-type: none"> <li>1. Knowing what to look for may take practice.</li> <li>2. Missing information, details about references given and gaps in the previous employment record are a few things to watch for on application forms.</li> </ol> <p>D. Select the best applicants to interview.</p> <ol style="list-style-type: none"> <li>1. Contact applicants.</li> <li>2. Schedule an interview with each individually. During the interview try to determine:               <ol style="list-style-type: none"> <li>a. suitability of past experience to the present job opening</li> <li>b. if each successive job has required higher levels of responsibility</li> <li>c. general health of applicant</li> <li>d. reasons for leaving previous jobs</li> </ol> </li> </ol> | <p>Obtain a copy of an employment application form currently used in a school district. Discuss the need for each item of information requested on it and if any additional information would be helpful in the selection process. (If no application form is currently used, list the items of information needed and as a class develop a sample application form.)</p> <p>Using the sample application form on Handout #7-2, identify together as a class the errors or missing information on the application. (Note: this application form complies with all of the current EEO regulations.)</p> |

# Lesson 7: RECRUITING AND SELECTING EMPLOYEES FOR CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | CLASS ACTIVITY                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <p><u>The Selection Process</u></p> <p><u>A. Initial (first) Interview</u></p> <ol style="list-style-type: none"> <li>1. If not conducted properly, an interview may not be useful in selecting the best applicant for the open position.</li> <li>2. Some helpful interviewing techniques are listed below. More detail is provided in Handout #7-3.               <ol style="list-style-type: none"> <li>a. Provide a pleasant, private surrounding for the interview.</li> <li>b. Ask questions that cannot be answered with a simple yes or no.</li> <li>c. Explain the details of the job. Read through the job description together and discuss the job expectations.</li> <li>d. Consider giving a tour of the job site so applicant is fully aware of the real job environment.</li> <li>e. Explain the best and least liked aspects of the job and the working conditions.</li> <li>f. Explain how performance on the job will be evaluated and how often.</li> </ol> </li> </ol> <p><u>B. Second Interview</u></p> <ol style="list-style-type: none"> <li>1. There are several advantages to having a two step interviewing process:               <ol style="list-style-type: none"> <li>a. it allows you to get a second opinion of the applicant.</li> </ol> </li> </ol> | <p>Using Handout #7-3, review the details of a proper interview together.</p> <p>112</p> |



## Lesson 7: RECRUITING AND SELECTING EMPLOYEES FOR CHILD NUTRITION PROGRAMS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>b. it allows you to ask some patterned interview questions which may be very helpful in making the hiring decision. Details of patterned interview questions are given on Handout #7-4.</li> <li>c. if an applicant really does not want the job you have available, he/she has the option of not showing up for the second interview. This is much easier than refusing your job during a face-to-face interview.</li> </ul> <p>C. <u>Study the results of the interviews.</u></p> <p>D. <u>Decide who to hire.</u></p>                                                | <p>Using Handout #7-4, discuss together the sample patterned interview questions and the reason for asking them. As a class, develop 6 questions to use in a patterned interview when hiring a cook. Indicate the reason for asking each question.</p>                                                                                                     |
| <p>II. <u>Summary</u></p> <p>A. The use of good hiring practices will almost immediately reflect very tangible results such as:</p> <ul style="list-style-type: none"> <li>1. increased worker productivity because the right worker is on the right job,</li> <li>2. reduction of costly employee turnover,</li> <li>3. fewer training problems because workers have required skills, and</li> <li>4. improved worker satisfactions giving fewer management problems and headaches.</li> </ul> <p>B. Remember, applicants should not be hired until you feel that the most qualified person is available.</p> | <p>Using Handout #7-5, divide participants into groups of 3 for an interviewing role play. One participant is to be the interviewer, one the applicant, and one the observer. Arrange to use a room for this exercise where a table and chairs are available for each group of 3. Details of how to direct this role play are provided on the handout.</p> |

Lesson 7: RECRUITING AND SELECTING EMPLOYEES FOR CHILD NUTRITION PROGRAMS

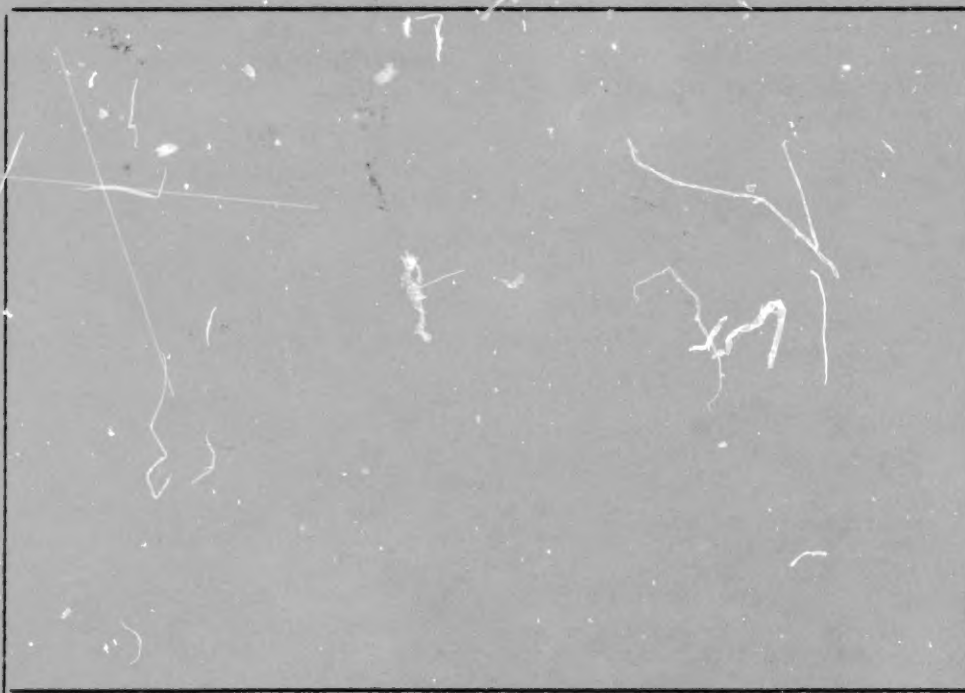
| LESSON CONTENT                                                                                                                                                                                                                                                                                | CLASS ACTIVITY |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <ol style="list-style-type: none"><li>1. Recruit from all possible sources.</li><li>2. Thoroughly study application forms.</li><li>3. Check all references.</li><li>4. Conduct proper interviews.</li></ol> <p>All of these steps will help make the correct hiring decisions.</p> <p>114</p> |                |

HANDOUT #7-1

DEVELOPING AN EMPLOYMENT ADVERTISEMENT

Develop a newspaper advertisement for a cook's position or other assigned position. A good way to start is to list on the back of this sheet all the advantages you can think of for being a cook in your particular food-service department. This may include your hours of operation, length of vacation, shift involved, or fringe benefits. Open the ad with words that will get someone's attention and will encourage them to read the rest of it. Leave enough blank space (called white space) so that it does not appear crowded.

DEVELOP YOUR COMPLETED AD IN THE SPACE BELOW:

A large rectangular box with a thin black border, intended for the student to write their completed advertisement. The box is empty and occupies the central portion of the page.

Instructor's Note - To assist participants in completing this exercise bring to class several examples of poorly written and well written advertisements for foodservice positions to review with the class prior to this assignment. Writing this ad may be used as a homework assignment.

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HANDOUT #7-2

EMPLOYMENT APPLICATION - INSTRUCTOR'S NOTES

Ask participants to read through the application on the next 3 pages. Have them circle or check any items that are incomplete or that raise questions or clues important for an interviewer to note.

Things to note on this application:

Position applied for - Is very vague and not specific. He may not want a foodservice job, just anything will do!

Date - Not complete which may indicate he has difficulty finishing tasks assigned or he is not careful about details.

What schedule are you available to work? - He has checked all choices indicating a lack of preference. This may mean he is desperate for the job and will "do anything on the shift"!

Have you been bonded? - He did not answer this because he may not understand the question and/or may hope you don't notice. Bonding companies always check very thoroughly on people's past records, especially law violations. He may know that, and has a criminal record he hopes you do not find out about.

Do you have a disability? - He checked yes but didn't explain it as requested. You need to get the details from him.

Are you a veteran? - He indicated he was in the Navy but didn't fill in his rank. He may have had a dishonorable discharge that he doesn't want you to know about.

Employment Experience - There are several items not filled in. Also need to question the gap in employment from 1969 to 1971, and 1976 to 1978. He may have been in the military then or...in jail, or ...? The supervisors' names are not complete, especially the third job. It might be very hard to find "John" in the Pontiac School system to get a reference for this applicant.

There may be other items of information that participants will identify as they review this application in detail.



HANDOUT #7-2

EMPLOYMENT APPLICATION

Answer all questions - please print:

In compliance with Federal and State equal opportunity laws, qualified applicants are considered for all positions without regard to race, color, religion, sex, national origin, age, marital status, or the presence of non-job-related medical condition or handicap.

Position(s) applied for \_\_\_\_\_ Date \_\_\_\_\_

Referral Source: Advertisement \_\_\_\_\_ Friend \_\_\_\_\_ Relative \_\_\_\_\_ Agency \_\_\_\_\_ Other \_\_\_\_\_

Name \_\_\_\_\_ Social Security No. \_\_\_\_\_  
Last First Middle

Address \_\_\_\_\_  
Number Street City State Zip

Phone \_\_\_\_\_ Are you known to schools/references by another name? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, by what name (nickname)? \_\_\_\_\_

Have you filed an application or been employed here before?

\_\_\_\_\_ Yes \_\_\_\_\_ No Dates \_\_\_\_\_

Are you a citizen of the United States? \_\_\_\_\_ Yes \_\_\_\_\_ No

What schedule are you available to work?

\_\_\_\_\_ Full time \_\_\_\_\_ Part time \_\_\_\_\_ On shifts

Do any of your friends or relatives work here? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, list name(s) \_\_\_\_\_

Are you \_\_\_\_\_ under 18 \_\_\_\_\_ 18 to 70 \_\_\_\_\_ over 70 years of age?

Have you been convicted of a felony or released from prison within the last 7 years?

Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, describe in full, including dates.



In case of accident or emergency, please notify:

Are you on lay-off and subject to recall? ☐ Yes ☐ No

Have you ever been bonded? ☐ Yes ☐ No

If yes, for which position(s) \_\_\_\_\_

Do you have a disability, a handicap or a medical condition that limits your job performance? ☐ Yes ☐ No If yes, please explain \_\_\_\_\_

Are you a veteran? ☐ Yes ☐ No

If yes, what was your branch of Military Service? \_\_\_\_\_

Rank \_\_\_\_\_

#### EMPLOYMENT EXPERIENCE

List each job held. Start with your present or last job. Include military service assignments.

1. Employer \_\_\_\_\_ Work Performed \_\_\_\_\_  
Address \_\_\_\_\_ Dates: From \_\_\_\_\_ to \_\_\_\_\_  
Job Title \_\_\_\_\_ Supervisor \_\_\_\_\_  
Hourly Rate/Salary: Starting \_\_\_\_\_ Final \_\_\_\_\_  
Reason for Leaving \_\_\_\_\_

2. Employer \_\_\_\_\_ Work Performed \_\_\_\_\_  
Address \_\_\_\_\_ Dates: From \_\_\_\_\_ to \_\_\_\_\_  
Job Title \_\_\_\_\_ Supervisor \_\_\_\_\_  
Hourly Rate/Salary: Starting \_\_\_\_\_ Final \_\_\_\_\_  
Reason for Leaving \_\_\_\_\_

3. Employer \_\_\_\_\_ Work Performed \_\_\_\_\_  
 Address \_\_\_\_\_ Dates: From \_\_\_\_\_ to \_\_\_\_\_  
 Job Title \_\_\_\_\_ Supervisor \_\_\_\_\_  
 Hourly Rate/Salary: Starting \_\_\_\_\_ Final \_\_\_\_\_  
 Reason for Leaving \_\_\_\_\_

If you need additional space, please continue on a separate sheet of paper.

Summarize special skills and qualifications acquired from employment or other experience. \_\_\_\_\_

|                                                                                                  | Elementary |   |   |   |   | High School |    |    |    | College |   |   |   |
|--------------------------------------------------------------------------------------------------|------------|---|---|---|---|-------------|----|----|----|---------|---|---|---|
| School Name                                                                                      |            |   |   |   |   |             |    |    |    |         |   |   |   |
| Years Completed<br>(circle)                                                                      | 4          | 5 | 6 | 7 | 8 | 9           | 10 | 11 | 12 | 1       | 2 | 3 | 4 |
| Diploma or<br>Degree                                                                             |            |   |   |   |   |             |    |    |    |         |   |   |   |
| Describe<br>Course of Study                                                                      |            |   |   |   |   |             |    |    |    |         |   |   |   |
| Describe specialized<br>training apprenticeship,<br>skills, and extra-curri-<br>cular activities |            |   |   |   |   |             |    |    |    |         |   |   |   |

AGREEMENT

I certify that answers given herein are true and complete to the best of my knowledge.

I authorize you to make such investigations and inquiries of my personal, employment, financial or medical history and other related matters as may be necessary in arriving at an employment decision. I hereby release employers, schools or persons from all liability in responding to inquiries in connection with my application.

In the event of employment, I understand that false or misleading information given in my application or interview(s) may result in discharge. I understand, also, that I am required to abide by all rules and regulations of the Company or Institution.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

## HANDCUT #7-3

### TECHNIQUES FOR EMPLOYMENT INTERVIEWING

#### A. PURPOSES OF AN INTERVIEW

1. To Obtain Information: facts, attitudes, feelings, personality traits.
2. To Give Information: about your department and the job opening. Any good interview is a two way conversation.
3. To Make A Friend: be courteous - an applicant may be a parent or a potential parent of your students.

#### B. DO'S AND DON'TS OF AN INTERVIEW

1. Do have a purpose and a plan for the interview such as a guided interview pattern.
2. Do have and know the job description and job specification.
3. Do provide a private place for the interview, free from interruptions and distractions.
4. Always assure and safeguard personal confidences.
5. Do put the applicant at ease; establish confidence and a free, easy talking situation.
6. Use the pronoun "I" very, very sparingly; "WE" is much better.
7. Listen with sincere and intensive interest.
8. Do not interrupt the applicant.
9. Do not talk too much. Talkative interviewers usually are not successful.
10. Do not rush the interview. This is discourteous, and usually results in failure of the interview.
11. Do not ask leading questions. If the question is so worded that the answer you want is apparent to the applicant, you are actually "interviewing yourself," so the interview is useless.
12. Do not ask questions which can be answered with a simple "Yes" or "No".
13. Ask questions beginning with WHAT, WHY and HOW. Useful phrases to keep constantly in mind are:
  - a. Would you give me an example?
  - b. For instance...
  - c. In what...

HANDOUT #7-3, page 2

14. Rather than talk when the applicant has finished a statement, use such responses as "uh-huh," "I see," "I think I understand," and "What else can you add to this statement?"
15. Do not agree and do not disagree. Be interested, but non-committal.
16. Do not argue, or the usefulness of the interview is finished.
17. Do not lose self-control, or control of the interview.
18. Strive to learn not only what the applicant thinks and feels, but why he/she thinks and feels that way.
19. Do not get in a rut. Do not leave any impression with the applicant that the interview is routine.
20. Do not "talk down" to the applicant or use technical words which may not be understood.
21. Do be pleasant and courteous.
22. Strive to be a good sounding board or mirror for the applicant's expressions of attitudes, feelings and ideas.
23. Do not ever express or imply authority. The good employment interview is a free and easy exchange of attitudes and ideas between equals.
24. Whatever you do, "do not jump to conclusions." The purpose of the interview is to get information, all the facts. Appraisal and conclusions will come after the interview.
25. Prod and search courteously for all the facts.
26. Do not preach or moralize. This is not the purpose of the interview.
27. Do not interview when either you or the applicant is upset or hurried.
28. Do maintain an attitude of friendly interest in the applicant. Make a friend even though you do not hire the applicant.
29. After the interview, make notes and a summary for record purposes.
30. If possible, ask one or two others to interview and give appraisals of the applicant.



HANDOUT #7-4

USING A PATTERNED INTERVIEW

In developing questions to use in a patterned interview, write questions that cannot be answered with a single word, or with a simple "yes" or "no." This means questions should usually begin with the word what, why or how.

Sample of Patterned Interview for Baker.

QUESTION

PURPOSE OF QUESTION

- |                                                                                                                                                                                                                               |                                                                                                                |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| 1. How did you decide to apply here for a job?                                                                                                                                                                                | 1. How does he/she feel about working here?                                                                    |
| 2. What do you consider to be the most important qualifications of a good baker?                                                                                                                                              | 2. Does he/she understand the full responsibility of the job?                                                  |
| 3. Suppose your manager/director insisted you do a certain thing in a certain way when you know definitely there is a better way. What would you do?                                                                          | 3. What is his/her attitude toward supervisors and authority. Would she be stubborn? Would he/she be creative? |
| 4. Suppose you are making a biscuit for lunch and you find there is not enough flour to make the amount of portions estimated. Your supervisor has gone to a meeting for the morning and is not available. What would you do? | 4. Is he/she capable of making decisions and solving problems related to her job?                              |

Develop your own patterned interview questions for the position of \_\_\_\_\_ as assigned by your instructor. List on the back of this page.

Lesson 8

TRAINING AND MOTIVATING FOODSERVICE WORKERS

A. GOAL OF THIS LESSON

The goal of this lesson is to understand the kinds of employee training used in foodservice operations and to be able to establish needed training programs.

B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. identify the contents of a complete orientation training program and how it should be used,
2. identify the components of a job training program and how it should be used,
3. identify the role and use of in-service training programs,
4. identify the benefits of a complete and sound training program,
5. describe motivation and its importance in any organization, and
6. list principles of personnel management that may help to maintain high levels of motivation.

C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of handouts.
2. Obtain copy of Quality Food, Quality Choice and Nutrition Education By The Foodservice Worker.
3. Reserve videotape "Quality Food, Quality Choice and Nutrition Education by The Foodservice Worker" from your Intermediate School district or the State Library (517-373-1593). Check to be sure you have the proper equipment to use.

D. KEY WORDS USED IN THIS LESSON

1. ORIENTATION TRAINING: The first training given to a new employee<sup>TSU</sup> which orients them to the job and the organization.
2. JOB TRAINING: The second step of training that involves learning the details and skills of a specific job.
3. IN-SERVICE TRAINING: Technical training that involves present employees; may be a review of important information or an updating so workers can stay current with new job knowledge.

E. REFERENCES FOR ADDITIONAL INFORMATION

1. Lundberg, D.E. and J.P. Armatas. The Management of People in Hotels, Restaurants and Clubs. (see lesson 1).
2. Travis, E. Profitable Food Service Management Through Worker Motivation. No. 6, National Restaurant Association, 1967. Chicago, IL.

Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | CLASS ACTIVITY |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>I. <u>A Need For Training</u></p> <p>A. In the early years of school foodservice there was small need for formal techniques for training employees.</p> <ol style="list-style-type: none"> <li>1. Cooking and serving of school lunches was a relatively simple operation.</li> <li>2. Cooking skills were passed on from parent to child. This then gave some people a trade that would support them in adulthood.</li> </ol> <p>B. However, with the introduction of new equipment and machinery, and interest in scientific nutrition and sanitation, formal training in school foodservice has become a necessity.</p> <ol style="list-style-type: none"> <li>1. Centralization of the feeding operation for several schools has created very large kitchens employing many workers.</li> <li>2. This has brought many problems to the foodservice manager, among them, the need for job training.</li> <li>3. Standardization of cooking methods to assure quality also made it necessary for managers to train workers in acceptable kitchen practices.</li> </ol> <p>C. Today training employees is a regular, acceptable part of operating a foodservice operation. It can be divided into 3 categories; orientation training, job training and in-service training. These are discussed on the next page in detail.</p> | <p>126</p>     |

## Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | CLASS ACTIVITY                                                                                                                                                                                                                                                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>II. <u>Orientation Training</u></b></p> <p>A. The purpose of an orientation training program is to give a new employee an overview of the foodservice department and/or school district. It should introduce the new employee to the physical facility and to co-workers.</p> <p>B. The content of an orientation program will vary depending on the particular school or district. However, there are certain things that are usually part of such training. These include the following items. The employee will:</p> <ol style="list-style-type: none"> <li>1. obtain a copy and review content of employee handbook if available:             <ol style="list-style-type: none"> <li>a. dress code required,</li> <li>b. scheduling regulations,</li> <li>c. pay days,</li> <li>d. insurance available,</li> <li>e. absentee policies for sick days and vacation,</li> <li>f. history of department or district,</li> <li>g. details on other fringe benefits offered,</li> <li>h. personal hygiene and sanitation standards,</li> <li>i. organizational structure and chain of command, and</li> <li>j. performance evaluation procedures.</li> </ol> </li> <li>2. obtain a copy and review content of union contract (if appropriate).</li> <li>3. tour department including locker room, employee lounge or eating area, restrooms, parking lot, entrance door and time clock.</li> </ol> | <p>To get participants to begin thinking about orientation programs, ask them to list items to include in such a program. List their suggestions on the board and compare it to the list at the left. Discuss reasons for including each item on the list.</p> |



## Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"> <li>4. be introduced to fellow employees and supervisors.</li> <li>5. review the organization chart of the department and school district and insert the names of those persons currently in those positions.</li> <li>6. review a map of the schools in the district with the numbers of meals served in each school each day.</li> <li>7. obtain a copy and review contents of job description for the position hired for.</li> <li>8. obtain signature on appropriate form that indicates they have received and understand all rules and regulations of the organization.</li> </ol>                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                             |
| <p>III. <u>Job Training</u></p> <ol style="list-style-type: none"> <li>A. The purpose of job training is to prepare a worker to perform the job for which he/she was hired.</li> <li>B. Job training may be informal or formal and varies greatly from district to district, school to school.             <ol style="list-style-type: none"> <li>1. <u>Informal job training</u> is most common.                 <ol style="list-style-type: none"> <li>a. A skilled present employee trains the new worker in the details of the job to be done.</li> <li>b. The two workers are scheduled on the same job for a number of days in order for the new employee to learn the requirements of the new job.</li> </ol> </li> </ol> </li> </ol> | <p>Review Handouts #8-1 and 8-2 for samples of a Training Progress Chart and a Job Training Description. Having such training tools available for each position is very desirable but does take time and effort to develop. Having something in writing to refer to at home is very helpful for a new employee and decreases the tensions of a new job.</p> |

## Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

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### LESSON CONTENT

#### 2. Formal job training may be done in a larger district.

- a. This may involve formal training classes and demonstrations given for a group of newly hired persons.
- b. Such training is frequently combined with on-the-job training or working with an older, skilled worker.
- c. Formal job training programs may have detailed check lists that the new worker must accomplish.
- d. It may also include detailed written job training descriptions which are discussed with new employees during training sessions.

- C. Training others takes skill and practice to be successful. By following the steps on Handout #8-3 training will become more organized and effective. Try using these steps the next time you are put in a training situation.

#### IV. In-Service Training

- A. The purpose of in-service training is to provide refresher training or updating for all employees, even those with experience.

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### CLASS ACTIVITY

Discuss the training procedures used in the schools represented by class participants. How would participants change the training procedures if they could?

Discuss together the steps on Handout #8-3. As a class identify a number of training topics to use with this 5 step training format. For example:

- using the French knife correctly
- how to take inventory
- uniform and dress code
- proper storage procedures for leftovers

Divide participants into pairs and ask each to apply the 5 step training format to their assigned training topic.

## Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

### LESSON CONTENT

### CLASS ACTIVITY

1. Such training may be a part of short department meetings.
2. Training be done in special training sessions scheduled for longer periods of time.

#### B. In-service training topics should:

1. provide workers with better methods for doing their work.
2. may explain new pieces of equipment of new food products.
3. topics may also include such things as refresher information on sanitation and safety in the kitchen, proper food storage methods or work simplification techniques to use on the job.
4. almost any topic that is job related would be suitable for an in-service training session.

As a class, list on the board topics that participants would like to have presented at in-service classes for themselves.

#### V. The Benefits of Training

- A. A new employee will learn more quickly what must be done on the job.
- B. A trained employee will do a better and safer job.
- C. Turnover and absenteeism may be less because workers feel comfortable with their skill level on the job.
- D. Productivity will increase because workers know exactly what they are to do.

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## Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | CLASS ACTIVITY |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>E. Breakage and spoilage may be reduced because workers know and follow work procedures correctly.</p> <p>F. Employees are better able to take on new and more responsible positions.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                |
| <p>VI. <u>Motivating Workers</u></p> <p>It is the dream of every manager/director to have a highly enthusiastic group of workers who do an outstanding job with "joy in their hearts." There is no simple, pat answer as to how a supervisor can motivate his or her workers. However, we have learned from extensive experience and research that there are basic principles and techniques which may enable a supervisor to improve his or her ability to motivate others.</p> <p>A. What are motivations?</p> <ol style="list-style-type: none"> <li>1. The dictionary defines "motivate" as "to provide with or affect; to incite; to impel."</li> <li>2. Motivation is a process used to direct workers' energies.</li> <li>3. Motivation is internal - within the individual worker and what motivates a person will depend upon his/her own reactions to the whole work situation. What motivates one worker to do a great job may not motivate the next.</li> <li>4. <u>How a worker feels</u> about this total work environment or situation will determine in a large part how well he works for you.</li> </ol> |                |

## Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | CLASS ACTIVITY                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>B. How are employees motivated?</p> <ol style="list-style-type: none"> <li>1. They must have adequate wages, job security and good working conditions so they are not dissatisfied with their jobs.</li> <li>2. They must find recognitions, self-esteem and feelings of accomplishment from their jobs.</li> <li>3. Employees should be made to feel and know that:               <ol style="list-style-type: none"> <li>a. their job of feeding children is very important,</li> <li>b. their work is very necessary to the success of the school foodservice program,</li> <li>c. their ideas for improving the foodservice are desired and needed,</li> <li>d. they are part of the whole team of foodservice employees working together to accomplish the same goals, and</li> <li>e. they should work together with their manager/director to make their jobs more important and meaningful.</li> </ol> </li> </ol> <p>C. What principles of personnel management may help establish and maintain positive levels of motivation among employees?</p> <ol style="list-style-type: none"> <li>1. School foodservice managers/directors <u>should</u>:               <ol style="list-style-type: none"> <li>a. explain changes in procedure in advance to all workers with the reasons for such changes,</li> </ol> </li> </ol> | <p>Show videotape "Quality Food, Quality Choice and Nutrition Education by the Food Service Worker" which discusses the self-esteem and self-image of school foodservice workers. After viewing the tape ask participants to discuss how self-esteem might affect worker motivation.</p> |



Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | CLASS ACTIVITY                                                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div><div><div>b. treat employees fairly and give them encouragement and praise,</div><div>c. defend and support employees,</div><div>d. trust employees to make decisions when they are qualified; don't be afraid to delegate,</div><div>e. be sincere, considerate and tactful with employees; treat them as you would like to be treated, and</div><div>f. assign unpleasant tasks on a fair and equal basis,</div><div>g. encourage employees to attend job related workshops and seminars.</div></div><div><div>2. School foodservice manager/directors <u>should not</u>:</div><div><div>a. publicly criticize or discipline employees,</div><div>b. be overly domineering or impossible to satisfy,</div><div>c. discuss private or personal problems with employees,</div><div>d. be untruthful or disregard established rules,</div><div>e. be impatient with workers unnecessarily, and</div><div>f. be closed to suggestions which employees offer.</div></div></div><div><div>D. Do foodservice workers have any responsibilities to help develop this atmosphere in a school foodservice operation? YES!</div><div><div>1. School foodservice employees <u>should</u>:</div><div><div>a. cooperate with the person who is your supervisor, manager or director,</div></div></div></div></div> | <div><div>Distribute <u>only</u> page 1 of Handout #8-4 on Motivation. Ask participants to rank in order the 10 items listed following the instructions given on the handout. When all have completed this step, distribute page 2 of Handout #8-4. Review page 2 together.</div></div> |

## Lesson 8: TRAINING AND MOTIVATING FOODSERVICE WORKERS

## LESSON CONTENT

## CLASS ACTIVITY

- b. offer suggestions for improved operation of the department,
- c. work efficiently and use initiative in completing your assigned job,
- d. always practice safety and sanitation principles on the job,
- e. support and be loyal to your school foodservice program, and
- f. be dependable, prompt and competent.
- g. seek to improve knowledge of job by attending workshops and seminars when possible.

2. School foodservice employees should not:

- a. be untidy in appearance or in work habits,
- b. be inefficient on the job,
- c. talk if it interferes with work,
- d. bring personal problems to work, and
- e. let jealousy interfere with the progress of work.

# A DISHWASHER TRAINING PROGRESS CHART

HANDOUT #8-1

| EMPLOYEES TO TRAIN |  | Introduction to department with tour | Orientation Program Completed | TASKS TO PERFORM       |                           |                    |                      |                   |                 |                    |                     |    |     |
|--------------------|--|--------------------------------------|-------------------------------|------------------------|---------------------------|--------------------|----------------------|-------------------|-----------------|--------------------|---------------------|----|-----|
|                    |  |                                      |                               | Get Dish Machine Ready | Scrape, Prerinse and Soak | Wash Glasses First | Wash Flatware Second | Wash Dishes Third | Wash Trays Last | Clean Dish Machine | Clean Dishroom Area | 9. | 10. |
| John Samson        |  | 2/9                                  | 2/9                           | 2/9                    | 2/9                       | 2/10               | 2/10                 | 2/10              | 2/11            | 2/11               | 2/11                |    |     |
| Sam Werner         |  | 3/5                                  | 3/5                           | 3/6                    | 3/6                       | 3/6                | 3/7                  | 3/7               | 3/8             | 3/8                | 3/9                 |    |     |
| Wilson Webber      |  | 3/8                                  | 3/8                           |                        | 3/8                       | 3/9                | 3/9                  | 3/9               | 3/9             |                    |                     |    |     |
|                    |  |                                      |                               |                        |                           |                    |                      |                   |                 |                    |                     |    |     |
|                    |  |                                      |                               |                        |                           |                    |                      |                   |                 |                    |                     |    |     |

This chart is for the director/manager to date when he/she has trained the employee to perform each job task. The chart shows that John and Sam have completed the training schedule while Wilson has several tasks yet to complete. Similar lists of important tasks to learn can be created for each kitchen position. The order which tasks are completed may not necessarily be the same order listed on the chart. For example, Wilson Webber has been shown the various tasks involved in actually washing dishes but the tasks involved with setting up, cleaning and breaking down the machine are yet to be done (tasks 1, 7 and 8).

## A JOB TRAINING DESCRIPTION

### HANDOUT #8-2

Below is a job training description or outline for a dishwasher. It consists of several tasks with numerous steps under each. The instructions are quite detailed. Each task listed below takes about 20 minutes to explain to a new worker. If the worker learns quickly, several duties may be covered (explained) at one time.

#### TASK 1 - GET DISH MACHINE READY

1. Fill soap dispenser if needed according to instructions on container.
2. Pre-check machine carefully according to list on wall by door.
3. Fill all machine tanks following procedures posted by door.
4. Check water temperature in all wash tanks before operating machine.

#### TASK 2 - SCRAPE, PRE-RINSE, PRE-SOAK DISHES

1. Using a rubber spatula scrape trash into garbage can by scrap table.
2. Don't let flatware get into garbage.
3. Pre-rinse dishes first with overhead spray above scrap table.
4. Keep garbage out of the dish machine.
5. Place all flatware in pre-soak sink. Pre-soaking softens hardened particles of food for easier washing.
6. Sort dishes by size and stack same sizes together.
7. Remove napkins and other paper from tray, glasses and dishes and put into garbage can.
8. Empty liquid from glasses and set upside down into glass racks.

#### TASK 3 - WASH GLASSES FIRST

1. Place glasses upside down in wash racks. Glasses turned up fill with wash water.
2. Run loaded baskets through dish machine.
3. Wash all glasses together at first if possible.
4. Let glasses air dry in baskets if possible or place upside down on clean glass holding trays.
5. Wash dishes and flatware after glasses.

TASK 4 - WASH FLATWARE SECOND

1. Be sure flatware is presoaked to loosen hardened food particles.
2. Put soiled flatware in round plastic holders, handles down.
3. Set filled holders in standard wash rack and run through machine.
4. Let flatware air dry. Never towel dry.
5. Sort flatware on clean towel placed on sorting table.
6. Sort into compartmented flatware holders.
7. Check while sorting for food particles and food stains that were not removed during the wash process. Place these back in the soak sink for a second washing.
8. Place sorted flatware holders on storage shelves in pantry as labeled.

TASK 5 - WASH DISHES THIRD

1. Rack sorted dishes on end in plate racks, like kinds together as much as possible. This makes stacking of clean dishes easier at the other end of the machine.
2. Don't let two dishes touch each other.
3. Place bowls and cups upside down in racks.
4. Run racks through machine.
5. Let dishes air dry. Never towel dry.
6. Stack clean dishes on clean dish carts as labeled.
7. Check clean dishes for clinging food particles. Rewash them.
8. Check clean dishes for cracks or chips. Place these in marked box in corner.

TASK 6 - WASH TRAYS LAST

1. Place trays sideways in racks having all face the same way.
2. Run tray racks through machine.
3. Let trays air dry or wipe with clean towel if not all dry.
4. Return trays to front pantry tray stand.

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HANDOUT #8-2, page 3

TASK 7 - CLEAN DISH MACHINE AT END OF DAY

1. Remove spray arms and clean with brush according to instructions posted by door of dishroom.
2. Drain dishmachine tanks by opening valve handles on each tank.
3. Clean strainers thoroughly with soapy water. Rinse well.
4. Remove and scrub dish machine curtains. Rinse well.
5. Reassemble machine.
6. Report broken parts to manager, or needed supplies for dishroom.
7. Wipe off sides and legs of dish machine with clean damp towel.

TASK 8 - CLEAN DISHROOM AREA

1. Clean scraping and loading tables using sanitizing solution specified on chart by mop closet door.
2. Dump garbage cans into large trash container behind dock area.
3. Clean garbage cans using the steam cleaner in mop closet. Follow operating instructions posted beside steam cleaner.
4. Mop dish machine floor using sanitizing cleaning solution specified on chart posted by mop closet door.
5. Be sure to clean under and in back of dish machine.

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## BASIC STEPS IN TRAINING WORKERS

### HANDOUT #8-3

#### STEP 1 - Preliminary

1. Prepare yourself for the training session by gathering all needed materials.
2. Organize your presentation.
3. Obtain sufficient copies of handout material needed.

#### STEP 2 - Prepare the worker

- \*1. Put the worker(s) at ease and state the specific job or task to be learned.
2. Start session by a review of what is already known about the task to be learned.
- \*3. Develop an interest and a desire to learn the task by stating why it is important to learn.

#### STEP 3 - Present the job or task to be learned

1. Tell, show, illustrate or demonstrate in a careful, patient manner.
- \*2. Demonstrate so all can see and speak so all can hear.
- \*3. Use understandable words and encourage questions during the training session.
- \*4. Stress the key points and the reasons for their importance.
5. Instruct clearly and completely, one point at a time.
6. Repeat task as necessary so that all understand.

#### STEP 4 - Have worker try out performance under supervision

1. Have learner do the job alone but correct errors as noted.
2. If needed, repeat demonstration and explain to learner why errors were made.
- \*3. Prompt learner by asking why, where, what and how questions about the task to be learned.
4. Continue training until learner demonstrates in a manner which is error-free and correct.

#### STEP 5 - Follow-up

1. Check on learning by evaluating the learner in some way either during the training session and/or on the job later.
2. Put learner on own and designate who the learner should go to for help if needed later.
3. Check back frequently with learner watching for the key points.

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HANDOUT #8-3, page 3

4. Taper off extra coaching and close follow-up as worker demonstrates desired skills.
5. However, maintain a check on learner's performance. Give praise by commending good work as well as detecting the employee's weaknesses.
6. Maintain dated record of training sessions held and the names of those who attended. Such data is desirable in personnel records and may be helpful in making promotion decisions.

\*These are especially important and should always be included in any training session.

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## MOTIVATION STUDY

### HANDOUT #8-4

Several years ago an extensive research project was done in order to determine workers' greatest needs and desires. Thousands of workers and supervisors were questioned in 24 organizations in order to determine these needs.

Supervisors were asked to rate 10 items in the order that they thought were most important to their workers. Workers were given the same list of 10 items and were asked to rate them for importance 1 through 10.

The 10 items used in this survey are listed below. Mark numbers 1 through 10 besides each item in the order you feel your employees think is most important.

- \_\_\_\_\_ Good working conditions
- \_\_\_\_\_ Work that keeps you interested
- \_\_\_\_\_ Feeling "in on the know" of things
- \_\_\_\_\_ Personal loyalty to workers
- \_\_\_\_\_ Good wages
- \_\_\_\_\_ Promotion and growth in the organization
- \_\_\_\_\_ Job security
- \_\_\_\_\_ Tactful discipline
- \_\_\_\_\_ Appreciation of work done
- \_\_\_\_\_ Sympathetic understanding of personal problems



Results of the Study--

Compare your list with the 2 lists below. How closely did you agree with the employee list?

What Supervisors Thought:

Good wages  
Job security  
Promotion and growth in the organization  
Work that keeps you interested  
Personal loyalty to workers  
Tactful discipline  
Appreciation of work done  
Sympathetic understanding of personal problems  
Feeling "in on the know" of things

What Employees Thought:

Appreciation of work done  
Feeling "in on the know" of things  
Sympathetic understanding of personal problems  
Job security  
Good wages  
Work that keeps you interested  
Promotion and growth in the organization  
Personal loyalty to workers  
Good working conditions  
Tactful discipline

It is apparent from this study that supervisors have greatly exaggerated the material aspects of worker motivation. Note that the four most important factors related by management (good wages, job security, advancement opportunity and good working conditions) are all materialistic factors, and that the more important mental and emotional needs of workers were given a very low rating by the supervisors.

Also note that the three most important needs listed by the workers (appreciation, "in on the know of things," and sympathetic understanding of personal problems) relate directly to mental and emotional needs. Also note that these 3 items were the bottom three on the supervisors' list. The wise manager/director who wants to improve his/her ability to motivate workers should take heed of these findings.



Lesson 9

HOW TO RUN A MEETING FOR MANAGER/DIRECTORS AND ABOVE

A. GOAL OF THIS LESSON

The goal of this lesson is to understand how a well run meeting should function and the role of the chairperson.

B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. identify the functions of a meeting,
2. specify how meetings are grouped or analyzed,
3. define the kinds of objectives a meeting might have,
4. construct a proper meeting agenda,
5. identify the role of the chairperson in a meeting,
6. relate various seating patterns found at meetings,
7. identify techniques used by a chairperson to control "talkers", draw out "silent" members and stop suggestion squashers, and
8. list the contents of well constructed meeting minutes.

C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of handouts.
2. Arrange for a chalkboard.

D. KEY WORDS USED IN THIS LESSON

1. AGENDA: an organized plan-of-action, usually in writing, that guides the activities of a group meeting.
2. COMMITTEE: a group of people organized for a specific purpose.

E. REFERENCES FOR ADDITIONAL INFORMATION

1. Baker, H.K. Management Review, "How to Make Meetings Meaningful," August, 1979, page 45-47 (see appendix 1).
2. Jay, Antony. Harvard Business Review, "Hot To Run a Meeting," March-April, 1976, page 43-57 (see appendix 2).
3. Auger, B.Y. Supervisory Management, "How To Run Better Business Meetings". Aug. 1980, page 35-39 (see appendix 3).

## Lesson 9: HOW TO RUN A MEETING FOR MANAGER/DIRECTORS AND ABOVE

### LESSON CONTENT

### CLASS ACTIVITY

#### I. Meetings

- A. Man is a social species and people will come together in small groups at regular and frequent intervals from time to time. This can be meetings connected with work or in other associations, teams, clubs or churches.
- B. All of us would agree that a great many meetings waste a great deal of everyone's time. It has been suggested that every committee or group should discuss its own dissolution once a year, and should have to justify why it should continue for another year. If this requirement did nothing else, it would at least refocus the minds of the members on their purposes and objectives.
- C. Although many people may feel that what is discussed at a meeting could be handled by memo, letter or over the telephone, a meeting still performs functions that will never be taken over by these alternate means of communications.

#### II. Functions of a Meeting - Meetings accomplish the following:

- A. Defines the group, unit or team.
  - 1. Those who are present belong to it; those absent do not.
  - 2. Members gain a sense of collective identity. They all know who they are such as the workers of the foodservice department, the foodservice directors of a particular school district, or members of the board of education of a particular district.

Lesson 9: HOW TO RUN A MEETING FOR MANAGERS/DIRECTORS AND ABOVE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | CLASS ACTIVITY |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>B. A meeting is the place where the group revises, updates and adds to what it knows <u>as a group</u>.</p> <ol style="list-style-type: none"><li>1. Every group creates its own pool of shared knowledge, experiences and judgements.</li><li>2. Remember, that the pool only consists of what the individual members have experienced or discussed as a group.</li><li>3. This pool of knowledge helps all members do their jobs more intelligently.</li><li>4. It also greatly increases the speed and efficiency of all of their communications among each other. You sort of build on knowledge from meeting to meeting.</li><li>5. This knowledge pool needs constant refreshing and occasionally the removal of impurities, so the exchanging of information and ideas that members have acquired since the last meeting is an important contribution to the strength of the group.</li></ol> <p>C. A meeting helps every member understand at least two things:</p> <ol style="list-style-type: none"><li>1. the collective aim of the group, and</li><li>2. the way everyone else's work can contribute to the success of the group.</li></ol> <p>D. A meeting creates a commitment by the members to the decisions the group makes.</p> <ol style="list-style-type: none"><li>1. Once something has been decided, even if you argue against it, your membership in the group obligates you to accept the decision.</li><li>2. The alternative to this is to leave the group.</li></ol> | <p>147</p>     |

## Lesson 9: HOW TO RUN A MEETING FOR MANAGERS/DIRECTORS AND ABOVE

### LESSON CONTENT

### CLASS ACTIVITY

#### III. Methods of Analyzing a Meeting

A. Size Categories - Meetings can be graded by size into three broad groups.

1. Assembly - a 100 or more people who are expected to do little more than listen to the speaker(s).
2. Council - 40 or 50 people who are there to listen to the main speaker but who can come with questions or comments. They may also be asked to contribute something on their own account.
3. Committee - up to 10 people who are all on an equal basis under the guidance or control of a chairperson.
4. We are concerned mostly with the committee meeting category which may also be called a subcommittee, study group or board. This is by far the most common type of meeting with over 11 million such gatherings occurring daily in the United States.

B. Frequency - Meetings can be grouped according to the frequency with which they meet.

1. This will vary from daily meetings and weekly meetings, up to annual and ad hoc (special purpose) meetings.
2. The frequency of meetings defines and helps determine the degree of unity among members of the group.

C. Composition - The composition of a group, or the kinds of persons included in a meeting, may also be a way to analyze a meeting.



## Lesson 9: HOW TO RUN A MEETING FOR MANAGERS/DIRECTORS AND ABOVE

### LESSON CONTENT

### CLASS ACTIVITY

1. Do group members work together on the same project daily, such as all the foodservice workers from one school kitchen?
2. Do the members work on different but parallel tasks, like all the directors/managers from one district?
3. Are the members of the group diverse, being strangers to each other, perhaps united only by the meeting itself or by a common interest. This might be a national meeting of school foodservice directors, or a workshop meeting sponsored by the intermediate school district.

#### IV. Define The Objectives of the Meeting

Review the topics to be covered at the meeting and determine which of the categories below each item falls into.

##### A. Informative-Digestive

1. Purely factual information, such as a monthly report, is a waste of time to circulate and read in a meeting.
2. Such information should be sent to committee members in advance so they can come to the meeting informed and ready to discuss the report.
3. Minutes of a meeting should be handled in this way.
4. Such topics are to inform members or is information they are "to digest" for general knowledge.

##### B. Constructive-Originative

1. This is the "What shall we do?" function of a committee and includes items that require determining a new policy or a new strategy.

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## Lesson 9: HOW TO RUN A MEETING FOR MANAGERS/DIRECTORS AND ABOVE

### LESSON CONTENT

### CLASS ACTIVITY

2. Determining what new items to include on a lunch menu would be an example.

#### C. Executive Responsibilities

1. This is the "How shall we do it?" function which comes after it has been decided what the members are going to do (step B. above).
2. The responsibilities for implementing the decision must be distributed around the table to various committee members.
3. If the committee helps make this implementation or action plan, it will be a collective commitment to see that it gets done.

#### V. Who to Include in the Meeting

- A. The success of a committee meeting is seriously threatened if too many people are present.
  1. Between 4 and 7 people is ideal.
  2. 10 people is tolerable and 12 is the outside limit.
  3. Include only those people who have an important contribution to make to the committee.
  4. Encourage others not to attend if possible, using tactful, positive methods.

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LESSON CONTENT

CLASS ACTIVITY

- B. If the leader of a committee sees no way of keeping the meeting down to manageable size, try to:
1. schedule agenda so that some people can leave and others can arrive at appropriate times,
  2. determine if two separate smaller meetings might be better, or
  3. determine if 1 or 2 sub-groups can thrash some of the topics out in advance so that only one of them needs to come to your meeting with the results.

VI. The Agenda

- A. The agenda is by far the most important piece of paper at a meeting. Constructed properly it has the power of speeding and clarifying a meeting.
1. The main weakness of most agendas is that they are brief and vague.
  2. Try to include on each agenda topic a brief indication of the reason it is to be discussed. Such headings might include:
    - a. "for information",
    - b. "for discussion", or
    - c. "for decision".
- B. Tips for creating effective agendas:
1. don't circulate the agenda too far in advance of the meeting. Usually 2 or 3 days in advance is about right. If sent too far in advance, the less organized members will forget it or lose it.

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### CLASS ACTIVITY

2. The early part of the meeting tends to be more lively and creative so if an item needs bright ideas and clear heads, put it toward the beginning of the agenda.
3. Some topics on an agenda may unite....or divide a group. Try to end a meeting with a topic that unites the group.
4. To avoid dwelling too long on trivial items, put times on the agenda at which discussion will occur for each topic and stick to it.
5. Schedule meetings for no more than 2 hours.
  - a. Very few meetings achieve anything of value after 2 hours.
  - b. An hour and a half is adequate for most purposes.
6. Include the starting and the finishing time of the meeting on the agenda to help members make plans around your meeting.
7. To limit the length of the meeting, schedule meetings to start one hour before lunch, or one hour before the end of the work day.
8. Circulate background or proposal papers with the agenda to help save time at the meeting. This helps members in formulating questions and considerations in advance.
9. Do not list "Any other business" on an agenda.
  - a. It is an invitation to waste time.
  - b. If something really urgent comes up the chairperson can announce it at the meeting.

Using Handout #9-1, complete the agenda exercise as explained at the top of the handout sheet.

## Lesson 9: HOW TO RUN A MEETING FOR MANAGERS/DIRECTORS AND ABOVE

## LESSON CONTENT

## CLASS ACTIVITY

VII. The Chairperson's Job

- A. Although we complain about being appointed chairperson, almost everyone is in some way pleased and proud to be made the chairperson of something.
1. It is the chairperson's self-indulgence that is the greatest single barrier to the success of a meeting.
  2. The best danger signal is hearing the chairperson talking a lot during a committee discussion.
  3. To achieve objectives, the chairperson will be more effective seeing him or herself as the servant of the group, rather than as its leader.
- B. The chairperson's role then becomes that of assisting the group toward the best conclusion or decision in the most efficient manner possible.
1. Control and discipline of the meeting then becomes not the act of imposing the chairperson's will on the group, but of imposing the group's will on any individual in the group who is in danger of diverting the progress of the discussion.
  2. There are many polite ways the chairperson can indicate a slight impatience when someone else is speaking. These include:
    - a. leaning forward,
    - b. fixing your eyes on the speaker,
    - c. tensing muscles,
    - d. raising your eyebrows,

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## Lesson 9: HOW TO RUN A MEETING FOR MANAGERS/DIRECTORS AND ABOVE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | CLASS ACTIVITY                                                                                      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <p>e. nodding briefly to show the point is taken, and<br/>f. replying or commenting with speed, brevity and finality of intonation in the voice</p> <ol style="list-style-type: none"> <li>3. The opposite actions will bring the opposite results when desiring more comment and discussion from group members.</li> <li>4. After a few meetings, all members will readily understand this nonverbal language of the chairperson.</li> </ol> <p>VIII. <u>The People on the Committee</u></p> <p>A. <u>Timing the Meeting</u></p> <ol style="list-style-type: none"> <li>1. There is only one way to ensure that a meeting starts on time and that is to start it on time.</li> <li>2. Latecomers who find that the meeting has begun without them soon learn their lesson.</li> <li>3. If you do not do this, punctual members will realize that a meeting never starts on the advertised time and they will learn their lesson...to always come late!</li> </ol> <p>B. <u>Seating at the Meeting</u></p> <ol style="list-style-type: none"> <li>1. Seating arrangement has an affect on the group behavior of the committee members and their relationships with each other.</li> <li>2. Sitting face-to-face across a table facilitates opposition, conflict and disagreement, so watch who sits across from you!</li> <li>3. Sitting side-by-side makes disagreements and confrontation harder. Thus, if you know you have difficulty getting along with a particular person, have him/her</li> </ol> | <p>Divide participants into pairs. Using Handout #9-2, design the "perfect seating arrangement"</p> |

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sit beside you so the friendship value of the seating arrangement can be taken advantage of.

4. Sitting on the immediate right of the chairperson puts one in the "dead man's corner", especially if people are seated in a line along the same side of the table. This does not apply if the chairperson is alone at the head of a long narrow table.
5. Sitting in close proximity to the chairperson is a sign of honor and favor. This is especially noticeable when the chairperson is at the head of a long, narrow table.

C. Controlling the "Talkers"

1. To stop someone who is dominating the discussion, a useful device is to pick out a phrase as he/she utters it, as an excuse for cutting in and offering the conversation to someone else.
2. For example, if Bob the "talker" says something about "automatic labor decrease" you, as chairperson, could say, "Automatic labor decrease; that's very interesting. Harriet, do you agree with Bob that there will be an automatic decrease in labor?" This stops Bob from continuing, at least for the moment and gives others a chance to speak.

D. Drawing out the "Silent" Members

1. At a meeting most of the members will be silent most of the time.

by discussing the pro's and con's of the various arrangements suggested. Decide where to put the members and the chairperson in each diagram, and decide which diagram is best of the 6 presented.

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2. Silence can indicate:

- a. general agreement
- b. no important contribution to make
- c. a need to wait and hear more before saying anything
- d. too good a lunch!!

3. Don't worry about these kinds of silence, but do break the following kinds of silence:

- a. of diffidence: if a member is shy or nervous, he/she may not offer any suggestions or comments. Encourage and draw out these people.
- b. of hostility: if a member is hostile towards you as the chairperson, or towards the meeting in general, or towards the process by which decisions are being made, you should probe it and usually you will find that there is something bursting to come out and that it is better out, than in.

E. Watch out for the "Suggestion Squashing Reflex"

- 1. Every suggestion offered at a meeting needs to be given a chance.
- 2. If members feel that making a suggestion will provoke a negative response, they will soon stop offering suggestions.
- 3. Everything that can be said at a meeting falls into these categories:
  - a. questions - seeking information

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b. answers - supplying information of three types

- (1) facts or data
- (2) opinions
- (3) suggestions

c. positive reactions

d. negative reactions

4. In most organizations it is the suggestions that contain the seeds of future success. Suggestions should be encouraged.
5. To discourage the member who likes to be a "suggestion squasher", require the squasher to produce a better suggestion on the spot!

F. Ask for Suggestions or Comments from the Most Senior People Last

If the senior members of the committee speak first, junior or new members may not speak up at all because they may feel inhibited.

G. Close the Meeting On a Note of Achievement

1. Summarize meeting briefly.
2. Even if the final item on the agenda is left unresolved, you can refer to an earlier item that was well resolved as you close the meeting and thank the group.
3. Set the next meeting date before you leave or close the meeting.

Use Handout #9-3 to review the proper procedure for conducting a discussion about an agenda items.

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| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | CLASS ACTIVITY |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p data-bbox="15 376 219 415">IX. <u>The Meeting</u></p> <p data-bbox="62 439 956 525">A. The minutes are the responsibility of the chairperson, even if this function is delegated to another member on the committee.</p> <p data-bbox="62 548 956 588">B. Minutes may be brief but should include the following items.</p> <ol data-bbox="117 611 940 838" style="list-style-type: none"><li>1. The time and date of the meeting, where held and who chaired it.</li><li>2. Names of all present and absent members.</li><li>3. All agenda items and other items discussed and all decisions reached. If action was agreed upon, record the name of the person responsible for the assignment.</li><li>4. The time at which the meeting ended.</li><li>5. The date, time and place of the next meeting.</li></ol> |                |



HANDOUT #9-1

WRITING A GOOD AGENDA

Divide participants into groups of 3 and construct a good, detailed agenda at the right using the general topics noted at the left. Apply the techniques discussed in class. Share the results with entire group.

POOR AGENDA  
(Too vague)

REVISED AGENDA  
(Be very specific with details)

- |                                  |     |
|----------------------------------|-----|
| 1. General announcements         | 1.  |
| 2. Last semester's costs reports | 2.  |
| 3. The budget                    | 3.  |
| 4. Personnel changes             | 4.  |
| 5. Summer programs               | 5.  |
| 6. Commodities                   | 6.. |
| 7. Other                         | 7.  |
| 8. Adjourn                       | 8.  |

## SEATING ARRANGEMENT FOR COMMITTEE MEMBERS

### HANDOUT #9-2

Key: M = member's seat

C = Chairperson's seat

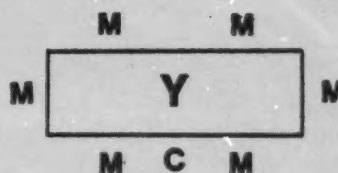
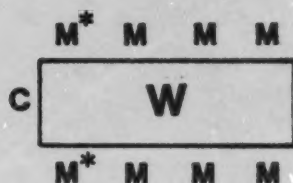
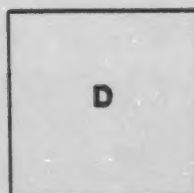
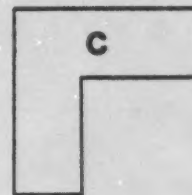
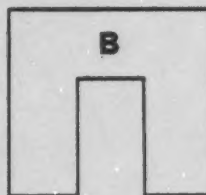
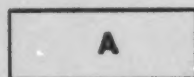


Table W illustrates how favoritism may exist when the chairperson sits at the end of a long narrow table. Favored members are shown with an asterisk. Table Y illustrates where "dead man's corner" is in relation to the chairperson. This unfortunate seat is shown with a circle around the "M".

### INSTRUCTIONS:

Divide participants into pairs to complete the exercise below. Place an "M" for member's seats, and a "C" for the chairperson's seat at each table below. There are 7 members plus the chairperson to be seated at each of the 6 tables below. At the end, circle the table you decide is the best arrangement to avoid favoritism, dead man's corner, and member oppositions.

Ask 6 participants from different paired groups to draw their suggestion for each table arrangement on the chalk board. Discuss as a group these results and try to reach a consensus.



MSU-NET  
FSHN/81

# HANDOUT #9-3

## STEPS IN LEADING A DISCUSSION ON AN AGENDA ITEM

The logical order for a group discussion can be paralleled to a doctor's diagnosis of a patient's ailment. Review the steps below and the columns at the right with the hypothetical information appropriate to the posed situation.

| <u>THE DOCTOR SAYS....</u>                                                                   | <u>THE DISCUSSION PROCESS...</u>                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. "What seems to be the trouble?" ( <u>The problem</u> )                                    | The agenda item states, "Participation in the district has dropped 7%"                                                                                                                                                                                                                                                                                     |
| 2. "How long has this been going on?" ( <u>a time frame</u> )                                | <p><u>STATE ALL RELEVANT BACKGROUND FACTS</u></p> <p>Decrease has occurred over 3 months from September through November.<br/>           Have there been major personnel changes during this time?<br/>           Have there been any policy changes during this time such as menu, prices, etc.?<br/>           Is there new competition in the area?</p> |
| 3. "Would you just lie down on the couch?" ( <u>Find out how the patient is right now.</u> ) | <p><u>NEED TO KNOW HOW THINGS STAND AT THIS MOMENT.</u></p> <p>How does participation last week compare to the week before? This month to last month? How much behind projections are we for this semester? Have individual schools taken any steps to combat this problem?</p>                                                                            |

4. "You seem to have slipped a disc." (Diagnose situation)

WHEN THE FACTS ARE ESTABLISHED, YOU CAN MOVE TOWARD A DIAGNOSIS. ELIMINATE ALL FAR-FETCHED EXPLANATIONS. GET IT DOWN TO A FEW PROBABLE CAUSES.

We increased prices 10% September first. Due to lower participation, labor hours were then cut so that some customer services may have decreased. There have been more student gripes lately also.

5. "Take this prescription to the druggist." (Write prescription)

THE COMMITTEE WILL CREATE ITS OWN PRESCRIPTION FOR SOLVING THE PROBLEM. IT MAY INCLUDE SEVERAL IDEAS.

Institute employee training program to give better service to students and staff. Meet with student committee to help offer suggestions on increasing participation.

**A. GOAL OF THIS LESSON**

The goal of this lesson is to review the most important aspects of the past 4 lessons by administering the following progress test.

**B. PURPOSE OF THIS LESSON**

After completing this test, the participants should be able to:

1. summarize and review the information in lessons 6 through 9
2. emphasize the most important points presented in lessons 6 through 9 and
3. identify subject areas in which further study is needed or desired.

**C. INSTRUCTOR PREPARATION FOR CLASS PROGRESS TEST**

1. The time allowed for this lesson is approximately 25 minutes.
2. Duplicate sufficient copies of Progress Test.
3. How the Progress Test should be given:
  - a. Pass out copies of the Progress Test to each participant.
  - b. Provide pens or pencils for those who may not have brought their own.
  - c. Explain that the reason for this Progress Test is to review the important information presented in the past three lessons.
  - d. Briefly go through the test together to explain the different kinds of questions to be sure that all participants know what they need to do for each question.
  - e. Allow approximately 25 minutes for participants to complete the test.
  - f. Allow participants to keep their own test while answers are discussed.
  - g. State aloud which answer(s) are correct for each question.
  - h. Discuss how to change false statements so they read "true".



- i. Lead a class discussion relating to reasons why other choices, if given, are incorrect. Ask participants to give examples of the application of each question to their school foodservice situation.
- j. Allow any participants who desire to do so to retake the test on their own time.
- k. Provide additional references on any topic to participants who desire further information.

NOTE: There is no minimum score for success on this test. It is a learning activity just as the other lessons have been.

LESSON 10: PROGRESS TEST (covers Lessons 6, 7, 8 and 9)

Circle the correct answer(s) in the questions below. More than 1 correct answer is possible.

MULTIPLE CHOICE

1. If a foodservice department is understaffed it may lead to:
  - a. high labor costs
  - b. high morale and high wages
  - c. poorly planned meals
  - d. poorly prepared meals
2. More labor hours (more total employees) would be required to run a foodservice operation if:
  - a. all new up to date equipment is in the kitchen
  - b. disposable dishes were used instead of chinaware
  - c. employees are new and unfamiliar with job skills
  - d. lots of convenience foods were used
3. Identify the false statement(s) below:
  - a. 15 meals per labor hour is an acceptable productivity rate
  - b. labor needs are generally greater in secondary schools
  - c. productivity rates usually decrease with worker experience
  - d. productivity rates are usually better in a large school as compared to a small school
4. Select the true statement(s) below about the employee recruitment process.
  - a. consider present employees for current job openings only as a "last resort"
  - b. job descriptions have little value at this time
  - c. review the specification thoroughly in advance of the interview
  - d. try to match the job to the applicant and his/her skills
5. Select the true statement below concerning the hiring process
  - a. a check on all references given on an application is very important
  - b. an application form is not necessary in the recommended recruitment process
  - c. it is recommended that you have only one applicant for each job opening
  - d. "overhiring" for a position is generally recommended

PROGRESS TEST, page 2

6. A two step interview process is
  - a. a waste of time usually
  - b. is best in all hiring situations
  - c. only recommended for part time positions
  - d. very difficult to arrange and perform
7. Using good hiring practices may show results such as:
  - a. decrease in worker productivity
  - b. decrease in worker satisfaction
  - c. fewer training problems
  - d. reduction of worker turnover
8. During the interview with an applicant, the manager/director should:
  - a. ask questions that can be answered with yes or no to save time
  - b. not talk too much
  - c. provide a private place for the interview
  - d. use the pronoun "I" frequently so the applicant realizes you are the boss
9. An orientation program might include:
  - a. a review of union contract
  - b. a test of skills known
  - c. thorough job training
  - d. a tour of the department
10. Number the items listed below in the proper order for a training class
  - \_\_\_\_\_ a. prepare the worker by telling why this task is important to learn.
  - \_\_\_\_\_ b. check on how much has been learned by a follow-up evaluation after worker is on his/her own.
  - \_\_\_\_\_ c. prepare yourself for the class by organizing your presentation.
  - \_\_\_\_\_ d. have worker try out the task under your supervision.
  - \_\_\_\_\_ e. demonstrate the task to be learned and stress the key points to be learned.
11. The purpose of in-service training is to:
  - a. orient a new worker to the job site.
  - b. provide refresher training for present personnel.
  - c. provide updated skills or information to present personnel.
  - d. train a new worker for a job

PROGRESS TEST, page 3

12. The benefits of training include:
  - a. decreased turnover rates
  - b. decreased productivity of workers
  - c. increased absenteeism rates
  - d. reduced breakage and spoilage
13. Motivation is:
  - a. always accomplished through paying very high wages
  - b. internal, within each individual worker
  - c. simple and easy to accomplish
  - d. the same for most workers
14. To maintain positive levels of motivation among employees, a manager/director should:
  - a. assign unpleasant tasks on a fair, even basis
  - b. be sincere and considerate
  - c. ignore suggestions offered by workers
  - d. never trust employees to make any decisions
15. Identify the true statement(s) below about meetings.
  - a. a committee should have no more than 15 members
  - b. an agenda should consist of broad, general topics
  - c. circulate the agenda 2 or 3 days prior to the meeting
  - d. very few things of value are achieved in a meeting that lasts longer than 2 hours
16. Leaning forward, raising eyebrows, and brief replies are all techniques used by a chairperson to:
  - a. encourage silent members in the group to talk
  - b. indicate impatience when a committee member is dominating or misleading a meeting
  - c. let group members know through body language of his/her feelings
  - d. make a meeting end sooner
17. Identify the true statement(s) below about seating arrangements at meetings.
  - a. having group members sit side-by-side encourages silence
  - b. having members sit side-by-side encourages agreement and cooperation
  - c. having members sit face-to-face facilitates cooperation and friendliness
  - d. having members sit face-to-face facilitates opposition and disagreement

PROGRESS TEST, page 4

18. Everything said at a meeting falls into the following categories:

- a. facts and data
- b. positive or negative reactions
- c. questions or answers
- d. all of the above

19. Minutes of a meeting should contain:

- a. agenda items discussed and decisions reached
- b. a summary of what was covered at the last meeting
- c. date, time and place of next meeting
- d. time and date and place of meeting



## Progress Test 2

### ANSWER KEY

1. c, d
2. c
3. c
4. c
5. a
6. b
7. c, d
8. b, c
9. a, b, d
10. a. 2  
b. 5  
c. 1  
d. 4  
e. 3
11. b, c
12. a, d
13. b
14. a, b
15. c, d
16. b, c
17. b, c
18. d
19. a, c, d

## Lesson 11

### WORK SCHEDULING IN FOODSERVICE

#### A. GOAL OF THIS LESSON

The goal of this lesson is to describe procedures necessary to schedule work in an effective manner for maximum productivity.

#### B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. identify the advantages of work scheduling,
2. list the purposes of developing work schedules,
3. develop a work schedule for non-daily tasks in a foodservice, and
4. create a daily production schedule from a given school menu.

#### C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of all handouts.

#### D. KEY WORDS USED IN THIS LESSON

1. WORK SCHEDULING: The process of planning for the best use of employees and equipment by listing tasks and times need to complete tasks.
2. PRODUCTION SCHEDULE: an organized plan that designates how much food is to be produced, when and person to do the preparation.

#### E. REFERENCES FOR ADDITIONAL INFORMATION

Van Egmond-Pannell, D. 1981. School Foodservice. Westport, CT. AVI Publishing Co., Inc.

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Lesson 11: WORK SCHEDULING IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | CLASS ACTIVITY |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>I. <u>USING WORK SCHEDULES HELPS SCHOOL FOODSERVICE MANAGERS/DIRECTORS OBTAIN MAXIMUM PRODUCTIVITY FROM SCHEDULED EMPLOYEES.</u></p> <p>A. Definition of a Work Schedule</p> <ol style="list-style-type: none"><li>1. A work schedule is a detailed listing of tasks and duties to be performed by an individual.</li><li>2. It usually includes time guidelines.</li><li>3. It may be categorized by job position such as cook, or by pieces of equipment used in the kitchen such as oven requirements for a day's menu. Examples will be discussed later.</li></ol> <p>B. Purposes of Work Scheduling</p> <ol style="list-style-type: none"><li>1. To inform employees of what work is to be done, who is to do it, and when it is to be completed.</li><li>2. To inform each employee of his/her individual responsibility in doing part of the work as it relates to all of the work assigned for that day.</li><li>3. To inform each employee of the sequence of each of his job duties in a day with time requirements as to when each duty must be completed.</li><li>4. To insure maximum utilization of each employee's time on duty. It is a management tool for planning and controlling the time and efforts of all workers and is of great help in improving the efficiency of the work staff.</li></ol> <p>171</p> |                |

## Lesson 11: WORK SCHEDULING IN FOODSERVICE

### LESSON CONTENT

### CLASS ACTIVITY

#### II. THERE ARE ADVANTAGES OF WORK SCHEDULING

A. Work scheduling organizes the school foodservice operation and has the following advantages: It:

1. saves time and energy. Time and energy of workers as well as possible savings in gas or electrical utility energy.
2. makes the job easier; by sequencing work, a job may be much easier to do.
3. it helps organize a smooth, efficient foodservice program and helps reduce confusion.
4. helps employees develop pride and a sense of security in their jobs because their work day is organized and satisfying.
5. provides less possibility of a job being left undone since developing a work schedule requires advance planning.
6. facilitates distributing responsibilities and work load more evenly among available workers and therefore worker morale is better.
7. makes delegation easier since an organized plan is used as a base for decisions.
8. may help develop interdepartmental cooperation since workers see more easily how their job relates to other areas of the foodservice department.
9. is an aid in training employees. Written work schedules are much easier to follow than verbal directions, especially for new workers and substitutes.

## Lesson 11: WORK SCHEDULING IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | CLASS ACTIVITY |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <ul style="list-style-type: none"><li>10. provides a way of showing the total quantity of food to be prepared in a given period of time. It is a way to get a quick overview of the menu production load for a given day.</li><li>B. Work schedules help foodservice personnel prepare the best quality meals in the shortest period of time with the least amount of effort.<ul style="list-style-type: none"><li>1. Schedules provide directors/managers with more time to manage without constant interruptions by workers requesting other work assignments.</li><li>2. It will help eliminate such worker questions as "What do I do now?" and "I need the mixer and someone else is using it!".</li></ul></li></ul> |                |
| <p>III. <u>WHO IS RESPONSIBLE FOR WORK SCHEDULING?</u></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                |
| <ul style="list-style-type: none"><li>A. The manager/director must be primarily responsible by:<ul style="list-style-type: none"><li>1. studying ways to divide the time available and the work to be done,</li><li>2. preparing and posting written schedules so all can read them, and</li><li>3. talking over scheduling problems with employees to get their ideas.</li></ul></li></ul>                                                                                                                                                                                                                                                                                                                               |                |
| <ul style="list-style-type: none"><li>B. Other personnel are also responsible for work scheduling. Workers must cooperate by:</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                |
| <ul style="list-style-type: none"><li><ul style="list-style-type: none"><li>1. following the posted schedules,</li></ul></li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 173            |



## Lesson 11: WORK SCHEDULING IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | CLASS ACTIVITY                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>2. providing suggestions for solving problems, and</p> <p>3. by improving their work techniques to improve scheduling.</p> <p>IV. <u>WHEN ARE WORK SCHEDULES PLANNED?</u></p> <p>A. Daily preparation and work schedules may be planned when you write menus.</p> <p>B. Prior to the start of the school year, plan weekly, monthly and yearly job schedules for tasks such as sanitation, safety, inventories and routine inspections that must be performed. These plans may be very general and may be revised when necessary to better fit the daily work schedules of food production.</p> <p>V. <u>HOW DO YOU DEVELOP A DAILY WORK SCHEDULE?</u></p> <p>A. List all the tasks to be done and divide them into the various work units or stations that are in the foodservice department. Work schedules may be divided into hot food preparation, cold food preparation and counter service.</p> <p>B. Within each work unit or station, assign tasks to each position responsible for completing it. A new manager may want to consult with the job descriptions to make sure that personnel are assigned jobs for which they have been hired and are able to perform.</p> <p>C. Each employee may be assigned to a specific work unit or station such as the salad station or bake shop or entree station.</p> | <p>Using Handout #11-1, divide into groups of 3 or 4 and complete the information about tasks that are not done on a daily basis. Give each group about 20 minutes to work on this activity. Share the results with the entire group.</p> |

## Lesson 11: WORK SCHEDULING IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. An employee is usually assigned to a particular work station on a regular basis. It is difficult for a worker to have a new job responsibility every day.</p> <p>2. However, all employees should be familiar with the duties of other work stations in case of illness or other emergency.</p> <p>D. Workers should be encouraged to assist other workers if necessary to make sure tasks are completed on time.</p> <p>E. Plan a reasonable time schedule during which the employee can be expected to complete the assigned job.</p> <p>1. Determining this may be difficult unless you have had quantity food preparation experience.</p> <p>2. Consultations with cooks may be helpful but be careful of "time stretching" where times required to complete jobs are enlarged.</p> <p>F. The work or production schedule should include:</p> <p>1. the amount to be prepared</p> <p>2. the recipe to be used</p> <p>3. the size of servings, and</p> <p>4. other information that may be necessary such as garnishes to be used, or records of leftovers, or actual food used.</p> <p>G. Include all housekeeping tasks in the work schedule that are to be done on a daily basis.</p> <p>175</p> | <p>Using Handout #11-2, review the Production Schedule. Discuss the need for the information given in each column.</p> <p>Using Handout #11-3 (2 copies for each participant) ask a group of 3 to write a production schedule for the high school menu noted at the bottom of the handout. Make up total amounts to prepare and indicate times</p> |

## Lesson 11: WORK SCHEDULING IN FOODSERVICE

### LESSON CONTENT

1. Also include non-daily tasks (weekly, monthly, and so forth) on the daily production schedule.
2. Workers may forget weekly or monthly tasks unless written on their daily work schedule.

### CLASS ACTIVITY

for batch cooking of lasagne, chicken and green beans. Using Handout #11-4, discuss the value of making Equipment Schedules for each day of your menu. What advantages are there for such a schedule?

# HANDOUT #11-1

## WORK SCHEDULE FOR NON-DAILY TASKS

Divide into small groups of 3 or 4 and pretend you are about to plan your annual work scheduled for yearly/monthly/weekly tasks. Try to list as many tasks under each column as you can. Daily tasks are not to be included here. The date during the year that each task is to be done can be entered when the lists are complete.

|                          | YEARLY | DATE | EACH SEMESTER | DATE | MONTHLY | DATE | WEEKLY | DATE |
|--------------------------|--------|------|---------------|------|---------|------|--------|------|
| Sanitation               |        |      |               |      |         |      |        |      |
| Safety                   |        |      |               |      |         |      |        |      |
| Inspection/<br>Inventory |        |      |               |      |         |      |        |      |
| Other Tasks              |        |      |               |      | 177     |      |        |      |

This list can then be used to assign tasks to individual workers on the daily work (production) schedule.

## HANDOUT #11-2

PRODUCTION SCHEDULE \_\_\_\_\_ (Date)

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STATION (Work Unit) \_\_\_\_\_

| WORKER | TASK | RECIPE NO. | QUANTITY TO MAKE | PORTION SIZE | TIME READY (Staggered) | GARNISH OR SPECIAL INSTRUCTIONS | LEFTOVERS OR TIME OUT | TOTAL AMT. SERVED |
|--------|------|------------|------------------|--------------|------------------------|---------------------------------|-----------------------|-------------------|
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |
|        |      |            |                  |              |                        |                                 |                       |                   |

(NOTE: \$ = serving)

Explanation of Chart

Beef Noodle Soup is fairly simple to understand in each column.

Scalloped Potatoes - The "Quantity to Make" is a total of 6 pans but because of a staggered need schedule, you are asking the cook to put it in 4 full pans, and 4 half pans. These pans are then scheduled on a staggered basis under the column "Time Ready". This provides freshly prepared appearances for all foods since none are held very long.

Roast Beef - The "Quantity to Make" is indicated as 115 lbs (raw) which will yield about 210 servings(\$). Portions are to be 3 oz. each with 14 servings (\$) per pan totaling 15 pans for the whole meal. Under the "Time Ready" column the exact times when the pans of roast beef are desired is specified to guarantee high quality on the serving line.

Green Beans - 40 lbs are estimated with a staggered "Time Ready" schedule.

The column marked "Leftovers or Time Out" is where the amount of each food that is leftover would be entered, or the time when that food ran out.



HANDOUT #11-3 (2 copies needed for each participant)

## PRODUCTION SCHEDULE

Divide into groups of 3. Using the high school menu at the bottom of this page, create a production schedule for the workers in this kitchen. Your typical participation is 420 hot lunches. Determine how much of each menu item you would make and then assign tasks to your three 6-hour kitchen workers. Use one Production Sheet for hot food preparation and the other for cold food preparation.

[illegible]

Portioning and plating of cold foods is done by counter serving personnel in this operation.

MENU: Tomato Soup \_\_\_\_\_ Gallons  
Lasagna (own recipe) \_\_\_\_\_ pns  
Fried Chicken \_\_\_\_\_ lbs

Green Beans \_\_\_\_\_ #  
Corn OBrien \_\_\_\_\_ #

Pineapple/Strawberry Gelatin \_\_\_\_\_ pns  
Cole Slaw Salad \_\_\_\_\_  
Apple Pie (brown off) \_\_\_\_\_ each  
Chocolate Sundae \_\_\_\_\_

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## HANDOUT #11-4

## SAMPLE OF EQUIPMENT SCHEDULE FOR ONE MEAL PERIOD

| EQUIPMENT AVAILABLE |     | 6:00 | 6:30                     | 7:00 | 7:30 | 8:00 | 8:30 | 9:00 | 9:30 | 10:00                           | 10:30 | 11:00 | 11:30 | 12:00 | 12:30 | 1:00 | 1:30 | 2:00 | 2:30 |
|---------------------|-----|------|--------------------------|------|------|------|------|------|------|---------------------------------|-------|-------|-------|-------|-------|------|------|------|------|
| Convection Ovens    | 1   |      | Portioned Turkey 15 pans |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |
|                     | 2   |      |                          |      |      |      |      |      |      | Scalloped Potatoes 4 + 4/2 pans |       |       |       |       |       |      |      |      |      |
| Steam Kettles       | 80G |      |                          |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |
|                     | 40G |      |                          |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |
|                     | 40G |      |                          |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |
| Steamer             | 1   |      |                          |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |
|                     | 2   |      |                          |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |
|                     | 3   |      |                          |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |
| Mixer               |     |      |                          |      |      |      |      |      |      |                                 |       |       |       |       |       |      |      |      |      |

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Lesson 12 EMPLOYEE PERFORMANCE APPRAISAL (EVALUATION)

A. GOAL OF THIS LESSON

The goal of this lesson is to describe the importance of an organized, systematic employee evaluation program through the use of periodic performance appraisals.

B. PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. list the steps usually followed in the evaluation process
2. identify the benefits from a sound employee performance appraisal program
3. develop criteria or job characteristics for determining performance standards of kitchen positions
4. demonstrate skills in performance evaluations in a simulated situation as assigned

C. INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of all handouts.
2. Ask participants to bring copies of their school's performance appraisal forms if they have them. These can be used during the discussion of rating scales under part IV-C.
3. Arrange for a blackboard.

D. KEY WORDS USED IN THIS LESSON

PERFORMANCE APPRAISAL (or EVALUATION): the personnel activity in which the operation (school management) determines the extent to which the employees are performing jobs effectively.

LEVELS OF ACCOMPLISHMENT: standards of job performance expected.

EVALUATOR BIAS: feelings or prejudices that may affect how an evaluator feels about an employee.

E. REFERENCES FOR ADDITIONAL INFORMATION

- Glueck, William F., 1978. Personnel - (Chapter 10), R.D. Irwin, Homewood, IL
- Lundberg, D.E. and J.P. Armatas. 1980. The Management of People in Hotels, Restaurants and Clubs. Wm. C. Brown Co. Publishers, Dubuque, IA (Chapter 7).
- Elliott, Travis, 1967. Profitable Food Service Management Thru Performance Appraisals. National Restaurant Association, Chicago, IL
- American Hospital Association. 1971. Employer Performance Appraisal Programs - Guidelines for Their Development and Implementation. Chicago, IL

## LESSON 12 : EMPLOYEE PERFORMANCE APPRAISAL

### LESSON CONTENT

### CLASS ACTIVITY

#### I. DEFINITION OF PERFORMANCE APPRAISAL

- A. Performance appraisal or evaluation may be defined as the personnel activity in which the institution or organization determines the extent to which the employees are performing jobs effectively.
- B. Normally there are several steps in this evaluation process.
  - 1. Establish job performance standards or job characteristics. This may be done by reviewing the job description for each job to be evaluated.
  - 2. Decide who should do the evaluation and how often it should be.
  - 3. Gather data on employee performance from fellow supervisors (managers/directors) or from your own observations.
  - 4. Evaluate the employee(s).
  - 5. Discuss each employee's evaluation with them in private.
  - 6. Discuss and plan future goals and objectives with the employees before the evaluation form is signed and filed.

#### II. BENEFITS FROM A SOUND EMPLOYEE PERFORMANCE APPRAISAL PROGRAM

- A. Reduces employee grievances
  - 1. A performance appraisal develops a "meeting of the minds".
  - 2. A worker and supervisor (manager/director) determine mutual goals and what is expected of the worker.
  - 3. Counseling may naturally occur during the appraisal process and a worker can get any complaints out in the open and "off his/her chest".

## LESSON 12: EMPLOYEE PERFORMANCE APPRAISAL

### LESSON CONTENT

- B. Improves job performance and increases productivity of workers.
  - 1. Studies have been done that show a 12 to 20% increase in productivity when a sound performance appraisal program was started and maintained.
  - 2. Since data tells us that productivity rates among food-service workers in only 45%, there is lots of room for improved productivity!
- C. Improves ability of manager/director to analyze and differentiate the abilities of employees. They learn to analyze the reasons why employees do certain things.
- D. Provides manager/director with an opportunity to participate in personnel management.
  - 1. It offers a setting to give recognition to workers; to tell them "how they are doing and where they stand".
  - 2. All workers need to know this as a part of overall job security.
- E. Discloses where training of employees is needed. As you evaluate workers, you recognize where they are lacking skills that may be corrected through proper training.
- F. Improves hiring practices by disclosing weaknesses in recruitment and placement. Errors in placement (putting a "round peg in a square hole") become obvious at evaluation time so a manager/director is better able to match people and jobs.

### CLASS ACTIVITY



LESSON 12: EMPLOYEE PERFORMANCE APPRAISAL

LESSON CONTENT

CLASS ACTIVITY

- G. Promotes employee development by providing challenges to employees.
  - 1. During a performance appraisal, new goals and challenges are set for workers.
  - 2. Workers can feel a real sense of accomplishment when they are able to meet established goals.
- H. Provides a sound basis for effective wages and promotion.
  - 1. Good performance appraisals are a valid and reliable basis for providing equal pay for equal work.
  - 2. It is a way to reward outstanding service and a way to promote qualified workers.
- I. Quality control in worker performance is achieved.
  - 1. Waste is eliminated by setting expected standards of performance.
  - 2. This prevents employees from becoming indifferent while on the job.
- J. Eliminates failures of employees who cannot perform on the job.
  - 1. Work groups resent the poor worker who is permitted to get by with slow or poor work.
  - 2. Good performance standards that are enforced will improve or eliminate such workers.
- K. Reduced turnover occurs because workers who are recognized, trained and have a high level of job satisfaction are happy and do not leave. Turnover is thus reduced by having a good performance appraisal program.

LESSON 12: EMPLOYEE PERFORMANCE APPRAISAL

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | CLASS ACTIVITY |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>L. <u>Management improvements that may be needed surface</u> during performance appraisals.</p> <ol style="list-style-type: none"> <li>1. Such evaluations tend to point out the shortcomings of various supervisors.</li> <li>2. This provides an excellent method for getting topics for manager/director in-service training sessions.</li> </ol> <p>III. <u>WHEN AND HOW TO EVALUATE</u></p> <p>A. When to evaluate may be a policy determined by the school district.</p> <ol style="list-style-type: none"> <li>1. In general, performance appraisals are done during probationary employment and on an annual basis for all employees.</li> <li>2. More frequent evaluation may be required during the first year of employment to determine skill levels and training needs.</li> </ol> <p>B. Evaluating an employee (the performance appraisal) is not complex and should be a positive experience for both individuals involved.</p> <ol style="list-style-type: none"> <li>1. Most people get a negative feeling when thinking about their annual performance appraisal because usually they are told about the bad things they have done or are doing.</li> <li>2. In general, when an employee is called into the office, it is when something is wrong.</li> <li>3. To eliminate this negative atmosphere, attempt to have a positive opening for the performance appraisal session.</li> </ol> |                |

LESSON 12 : EMPLOYEE PERFORMANCE APPRAISAL

LESSON CONTENT

CLASS ACTIVITY

Begin by asking the employee the following questions:

- a. What do you like most about your job?
- b. What do you dislike most about your job?
- c. What do you think can be done about what you dislike?

4. This two-way conversation will create a more positive setting. Then as you review the actual evaluation form with the employee, there is a clearer understanding by both people.

5. It is the policy of some organizations to have the employee complete a self-evaluation using the same performance appraisal form.

- a. The evaluator and the worker can then compare the ratings each made.
- b. They can discuss differences and how to cope with them in the future.

C. An effective performance appraisal leaves the employee with a positive attitude overall and a feeling that there are new goals and challenges to accomplish during the coming months.

IV. WHERE DO YOU START IF THERE IS NO FORMAL APPRAISAL PROGRAM?

A. Develop a Good Evaluation Form

1. Define the important and desirable job characteristics for each job or position.
  - a. Make a list of the traits using a current job description for reference.
  - b. For example, list all the traits that are most important for a good cook to have.

Distribute Handout #12-1 (both pages) and divide participants into groups of 3 or 4 people. Assign a specific foodservice job title to each group such as cook, assistant, baker, helper, etc.

Ask each group to:

1. List all the job characteristics or traits that are important for success on that job.

LESSON 12: EMPLOYEE PERFORMANCE APPRAISAL

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | CLASS ACTIVITY                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>c. Important information may be offered from present cooks who know what it takes to be a successful cook.</p> <p>2. Take the list of traits and number them in the <u>order of their importance on the job</u>.</p> <p>a. Select the "top 10" traits. These 10 traits will then be used as standards of performance on the evaluation form used for this particular job.</p> <p>b. Experts in the field of evaluation say that 8 to 10 job characteristics is ideal.</p> <p>c. More than 10 becomes cumbersome and an overlapping among traits occur.</p> <p>d. Remember, it is the <u>most important</u> job characteristics that are of concern because they have the most impact on the successful operation of a kitchen.</p> <p>3. Determine "levels of accomplishment" for use as a rating scale evaluation form. An example of such a rating scale is shown with 4 performance levels and simple descriptions of each level.</p> <p>a. 4 - exceeds job requirement<br/> 3 - meets job requirements<br/> 2 - needs improvement to meet job requirements<br/> 1 - does not meet minimum requirements</p> <p>b. In order to summarize overall performance, number values may be given to each performance level so a total score may be determined.</p> | <p>2. Select the 10 most important traits from the list created and enter these on page 1 of Handout #12-1 under the column titled "Job Characteristics".</p> <p>Share lists from each group with entire class. If desired, the results of each group could be typed on an evaluation form and could be distributed to class members for use in their own departments.</p> |

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# LESSON 12: EMPLOYEE PERFORMANCE APPRAISAL

## LESSON CONTENT

- c. Words used in rating scales should be as objective as possible so that evaluator bias does not affect the evaluation.
  - (1) It is easy to become subjective while doing evaluations because we all tend to "like some workers better than others" and this may affect how we rate them on an evaluation.
  - (2) Our personal subjective feelings influence our judgment and evaluations.
- d. One way to eliminate subjective evaluations is to use words in the rating scale that can be easily measured. For example, if the words on the rating scale says "meets department standards", you can measure this for a trait such as "neatly dressed and clean" or for a trait such as "follows recipes accurately".
- e. Subjective words to avoid because they are not easily measured include: poor, below average, average, above average, satisfactory, low, high, highest, excellent, always, never, and sometimes. (List these words on the board or flip chart).
4. Include space on the form for comments or for examples.
  - a. These can be illustrations of a particularly strong or weak job characteristic.
  - b. Especially low ratings should be explained with an example, to clarify the weakness to the employee.
  - c. Likewise, examples of strong characteristics are a pleasure to hear during an evaluation.
  - d. A space for general comments is also recommended so that an evaluator can include a description of something that does not fit into any of the listed job characteristics.

## CLASS ACTIVITY

If participants are interested in actually designing an evaluation form to use in their district or school, review Handout #12-3 which includes 8 format types and definitions of words typically used on evaluation forms.



## LESSON 12: EMPLOYEE PERFORMANCE APPRAISAL

### LESSON CONTENT

- e. Include space for the employee to comment on the evaluation, to sign and also date it.
- f. The evaluator should also sign the evaluation.
5. Designing format or actual layout of an evaluation for may vary greatly from district to district. A sample format is included as Handout #12-1 for reference. This format is simple and easy to use and includes all of the important parts as described in this lesson.
6. Match the evaluation form to the job.
  - a. A weakness in many evaluation forms used today is that the same form with the same job characteristics or traits is used for all workers, regardless of their positions.
  - b. Traits such as dependability, being cooperative, and following directions are traits on which all workers can be judged, but each job has its unique characteristics.
  - c. For example, being neat and clean in appearance is very important for counter servers who are seen by the public. This trait is not nearly as important for a dishwasher who is never seen by the customers.
  - d. The personality and attitude of a cashier is very important for job success while being less important for a cook or kitchen worker.
  - e. The advantage of using an evaluation form such as that shown on Handout #12-1 is that the 10 most important traits or job characteristics for each position can be written in as needed for each evaluation.

### CLASS ACTIVITY

Review the performance appraisal forms brought to class from each district. Exchange forms among participants and evaluate each one using guidelines provided in this lesson. Judge it for appropriateness for each type of kitchen worker and for ease of use by the evaluator. Share the results of this exercise with entire class.

(During a class break, share Handout #12-5 with participants).

If time permits, have participants using this form complete the role-play exercise described in Handout #12-2 (includes 10 pages and takes about 45 to 60 minutes to complete depending on the amount of class discussion included).

LESSON 12: EMPLOYEE PERFORMANCE APPRAISAL

LESSON CONTENT

- B. Share the Evaluation Form With Workers and Explain How and When it Will be Used.
1. Have an employee meeting and explain the evaluation form to everyone.
    - a. Give each worker a copy that includes the job characteristics for his/her own position.
    - b. It is only fair that workers know how they will be evaluated and what traits are most important for job success.
  2. Tell workers when their first evaluation will occur using this form. This may be done at the same time for all workers, say in December or January annually, or it may be done on the anniversary date of each employee.
  3. Explain to employees that the evaluation is meant to be a positive experience that will help them become better workers.

CLASS ACTIVITY

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PERFORMANCE APPRAISAL EVALUATION FORM

HANDOUT #12-1

Employee's name: \_\_\_\_\_ Job Title: \_\_\_\_\_

Place of Employment: \_\_\_\_\_

Starting Date: \_\_\_\_\_ Date of this evaluation: \_\_\_\_\_

Rating Scale

4-Exceeds Job Requirements

3-Meets Job Requirements

2-Needs Improvement to Meet Job Requirements

1-Does Not Meet Minimum Requirements of Job

Using this rating scale, enter the appropriate number indicating your rating for each job characteristic listed below. Total the rating numbers for all 10 characteristics to determine overall evaluation score. There is a possible score of 40 (a score of 4 for each of the 10 traits rated).

| <u>JOB CHARACTERISTICS(Traits)</u> | <u>score</u>         | <u>comments</u> |
|------------------------------------|----------------------|-----------------|
| 1. _____                           | <input type="text"/> | _____           |
| 2. _____                           | <input type="text"/> | _____           |
| 3. _____                           | <input type="text"/> | _____           |
| 4. _____                           | <input type="text"/> | _____           |
| 5. _____                           | <input type="text"/> | _____           |
| 6. _____                           | <input type="text"/> | _____           |
| 7. _____                           | <input type="text"/> | _____           |
| 8. _____                           | <input type="text"/> | _____           |
| 9. _____                           | <input type="text"/> | _____           |
| 10. _____                          | <input type="text"/> | _____           |

Total Rating Score \_\_\_\_\_

General Comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Employee: \_\_\_\_\_ Evaluator: \_\_\_\_\_  
(signature) (signature) (date)

## PERFORMANCE APPRAISAL EVALUATION FORM

Employee's Name: Ron Jefferies Job Title: Receiver/Stockperson

Starting Date: 3-20-78 Date of this evaluation: 4-20-81

1-Does Not Meet Minimum Requirements of Job

| JOB CHARACTERISTICS(Traits) |                                     | score                | comments |
|-----------------------------|-------------------------------------|----------------------|----------|
| 1.                          | Dependable                          | <input type="text"/> |          |
| 2.                          | Accurate with Figures               | <input type="text"/> |          |
| 3.                          | Positive Work Attitude              | <input type="text"/> |          |
| 4.                          | Efficient Use of Work Time          | <input type="text"/> |          |
| 5.                          | Ability to Organize                 | <input type="text"/> |          |
| 6.                          | Physically Able                     | <input type="text"/> |          |
| 7.                          | Cooperative                         | <input type="text"/> |          |
| 8.                          | Follows Instructions                | <input type="text"/> |          |
| 9.                          | Potential For Advancement           | <input type="text"/> |          |
| 10.                         | Works Well with Minimum Supervision | <input type="text"/> |          |

General Comments:

---

Employee: \_\_\_\_\_ Evaluator: \_\_\_\_\_  
(signature) (signature) (date)



## ROLE PLAY SITUATIONS - PERFORMANCE APPRAISAL EVALUATIONS

### HANDOUT #12-2

Divide participants into groups of three and assign a number of 1, 2 or 3 to each group member. These numbers represent the roles each will play.

Person 1 - The Manager  
Person 2 - The Employee  
Person 3 - The Observer/Recorder

Distribute the descriptions of each role to be played to the appropriate persons in each group as noted on pages 3, 5 and 7 of this handout. The completed performance appraisal evaluation forms for the employees involved are also provided for the manager (Person 1) to use in the role-play as a basis for the discussion. Person 3 from each group will review the details of the situation from each point of view so as to be a better prepared observer during the actual evaluation role-play.

NOTE: Read the rest of this page to the participants in class or distribute a copy to each.

#### THE SITUATION:

You are the new manager (4 months on this job) in a large kitchen which serves over 4000 meals per day. It is time for the annual performance appraisal for 3 of your employees and you must talk to them today. You have asked each of the employees to come to your office at the end of their work shift today.

#### The Role-Play:

PERSON 1 (the manager) - Review the completed evaluation for the worker and the situation description provided and decide how to handle this evaluation discussion so as to keep a positive atmosphere between you and the employee. Allow 10 to 12 minutes for the managers to develop an approach or solution. Do not talk to others about your situation except the instructor if you are having difficulty. Use page 9 of this handout as an outline to follow during the evaluation discussion. Create any additional details or information you feel you need to complete this activity.

PERSON 2 (the employee) - Read through the role-play situation provided so as to become familiar with the image you are to present. Be flexible during the role-play and create any details needed to make the situation seem realistic.



HANDOUT #12-2, page 2

PERSON 3 (the observer/recorder) - Gather with all other "3's" and review the descriptions given to the manager and employee so you are familiar with the situation being presented. Then as a group create a list of 4 to 6 criteria or important things that would be ways to judge a good performance appraisal session. Use the lecture presentation given today for ideas. For example, one criteria might be: How did the manager open the evaluation session? Did he/she make the employee feel relaxed and at ease in some way?

INSTRUCTOR: Share page 10 of this handout (Evaluation of Performance Appraisal Session) with this group after they make their list to make sure the important points are all included. Revise their list as needed so that the important points are being noted during the evaluation.

During the actual performance appraisal role-play, observe the manager and employee and take note of the various criteria you developed and if you observed each occurring.

NOTES TO INSTRUCTOR

When the managers have determined their approach to their situation, ask each group of 3 to arrange seating close to each other. Ask "the employee" (Person 2) to approach "the manager" (Person 1) as if entering the office, as requested, at the end of the work shift. Then proceed with the performance evaluation.

When all groups have completed the role-play, ask the observers from each group to report the results of the evaluation and what they observed.

SITUATION A (Give to Person 1 and 3 of this group) (Read to Class)

PERSON 1, The Manager

Roger has been with the department for 17 years. He started as a dishwasher and has worked his way up to head stockroom steward which is a position called Chief Steward. As Chief Steward he has performed very well for the past 7 years. He is thorough, accurate and dependable but you sincerely feel he is not capable of progressing any further in your department. Roger is presently at the top of his pay scale for his classification. This is his annual performance review. He has asked you for a raise twice in the past few months and you know he will ask you again for it during this interview.

How would you handle Roger so that he remains satisfied with his job and continues to be a productive employee? There is no union in your department.

(cut apart here) -----

SITUATION A (Give to Person 2 and 3 of this group only)

PERSON 2, The Employee, Roger

You are a very quiet, reserved person. You have been loyal to the department for 17 years and have given, you feel, a great deal of effort toward the success of the foodservice department. However, you also feel that you deserve more money...higher wages. You think you are capable of more responsibility and would like to be a kitchen supervisor which is a position that pays more money. You and your family are finding it very hard to "make ends meet" every month at home. You and your wife have decided you must insist on more money at this performance review.

### PERFORMANCE APPRAISAL EVALUATION FORM - (Situation A)

HANDOUT #12-2, page 4

Employee's name: Roger Job Title: Chief Steward

Place of Employment: Bayside High School

Starting Date: 1964 Date of this evaluation: May 15, 1981

### Rating Scale

4-Exceeds Job Requirements

### 3-Meets Job Requirements

## 2-Needs Improvement to Meet Job Requirements

1-Does Not Meet Minimum Requirements of Job

Using this rating scale, enter the appropriate number indicating your rating for each job characteristic listed below. Total the rating numbers for all 10 characteristics to determine overall evaluation score. There is a possible score of 40 (a score of 4 for each of the 10 traits rated).

| <u>JOB CHARACTERISTICS(Traits)</u>       | <u>score</u> | <u>comments</u>                                   |
|------------------------------------------|--------------|---------------------------------------------------|
| 1. <u>Accurate with Details</u>          | <u>4</u>     |                                                   |
| 2. <u>Cooperative</u>                    | <u>3</u>     |                                                   |
| 3. <u>Dependable</u>                     | <u>4</u>     |                                                   |
| 4. <u>Ability to Organize</u>            | <u>3</u>     |                                                   |
| 5. <u>Efficient Use of Time</u>          | <u>3</u>     |                                                   |
| 6. <u>Physically Able</u>                | <u>3</u>     |                                                   |
| 7. <u>Positive Work Attitude</u>         | <u>2</u>     | <u>continues to ask for more responsibilities</u> |
| 8. <u>Works with Minimum Supervision</u> | <u>4</u>     |                                                   |
| 9. <u>Potential For Advancement</u>      | <u>2</u>     | <u>additional training required first</u>         |
| 10. <u>Follows Instructions</u>          | <u>3</u>     |                                                   |
| <b>Total Rating Score</b>                |              | <b>31</b>                                         |

General Comments:

Roger would probably need more training in order to accept additional job responsibilities.

Employee: \_\_\_\_\_ Evaluator: \_\_\_\_\_  
(signature) (signature) (date)

SITUATION B (Give to Person 1 and 3 of this group) (Read to Class)

PERSON 1, The Manager

You have a cafeteria counter server, Sara, who has been with the department 14 years. She has a loud voice and a bossy attitude toward all of the kitchen cooks, especially the newer ones. She frequently makes loud verbal criticisms of food products and returns pans of food to the cooks herself telling them it doesn't taste or look right to her. Most of the time she is right about the food because she is a quality person who knows the importance of the high quality standards the department demands. The way she goes about telling people they are wrong has made her several real enemies in the kitchen, and 2 of your dependable cooks have threatened to leave if she doesn't "keep her big mouth shut and leave them alone".

Sara is an excellent worker. She smiles and talks with customers and knows many of them by name. She is always trying to encourage people to take a vegetable or take soup which increases your daily check average in the cafeteria. Her personality is totally different when she is out on the line in front of the public.

You have lived with this "Sara situation" long enough. You can't afford to lose 2 good cooks so you are going to discuss this problem today with Sara during her annual performance appraisal.

How would you handle Sara so that you cooks do not leave?

-----  
(Cut apart here)

SITUATION B (Give to Person 2 and 3 only)

PERSON 2, The Employee, Sara

You feel that the customers are the most important thing about your job. If there were no customers, there would be no cafeteria! If the customers are satisfied and happy with the food, sales will increase and costs can be met. Customers in a cafeteria situation "eat with their eyes" and are perhaps more picky about food appearance and quality. Because you have been with the department 14 years longer than anyone else in the kitchen, you feel you know the quality standards of the various foods completely. You feel the complaints of the cooks are unjust and that they just don't really care about preparing high quality foods. You feel they just have "thin skin" and can't take criticism like a grown person should.



HANDOUT #12-2, page 6

Starting Date: 1967 Date of this evaluation: May 20, 1981

4-Exceeds Job Requirements  
3-Meets Job Requirements  
2-Needs Improvement to Meet Job Requirements  
1-Does Not Meet Minimum Requirements of Job

| <u>JOB CHARACTERISTICS(Traits)</u>         | <u>score</u> | <u>comments</u>                                                          |
|--------------------------------------------|--------------|--------------------------------------------------------------------------|
| 1. <u>Clean-Neat in Appearance</u>         | <u>3</u>     |                                                                          |
| 2. <u>Courteous to Customers</u>           | <u>4</u>     |                                                                          |
| 3. <u>Positive Interest in Job Success</u> | <u>3</u>     |                                                                          |
| 4. <u>Dependable</u>                       | <u>3</u>     |                                                                          |
| 5. <u>Follows Instructions</u>             | <u>3</u>     |                                                                          |
| 6. <u>Works well with fellow workers</u>   | <u>1</u>     | <u>exceeds job boundaries</u><br><u>which irritates fellow workers</u>   |
| 7. <u>Physically able</u>                  | <u>3</u>     |                                                                          |
| 8. <u>Efficient use of time</u>            | <u>3</u>     |                                                                          |
| 9. <u>Careful of job details</u>           | <u>4</u>     |                                                                          |
| 10. <u>Potential for advancement</u>       | <u>2</u>     | <u>has difficulty dealing with</u><br><u>people in a positive manner</u> |

Total Rating Score 29

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Employee: \_\_\_\_\_ Evaluator: \_\_\_\_\_  
(signature) (signature) (date)



SITUATION C (Give to Person 1 and 3 of this group) (Read to Class)

PERSON 1, The Manager

You have a kitchen helper named Kathy who is a "wanderer". Her job is basically kitchen housekeeping and sanitation. You never seem to find her where you think she should be. She has been with the department for only 11½ months and transferred into the foodservice department from the general housekeeping staff. Her reason for the transfer was a desire to learn the food business "from the bottom up". She has taken several commercial food courses while in high school and is now 19 years old. Kathy is popular with the older women in your department because she is always volunteering to do odd jobs for them such as bringing a case of lettuce from the walk-in refrigerator out to a work station, or fetching counter pans from the pot station. She is always pleasant, courteous and has a good attitude about learning new projects or attempting new assignments. You feel her main job...that of sanitation... is being neglected. Whenever questioned about a job or task that didn't get done, her answers always sound logical. For example, when you asked her, "Kathy, I thought you were mopping the storeroom?" She answered, "I was, but John (the receiver) came by and asked me to help put the bread order away because he had to put the frozen food order in the freezer."

How would you handle this situation with Kathy at this first annual performance evaluation?

-----  
(Cut apart here)

SITUATION C (Give to Person 2 and 3 only)

PERSON 2, The Employee, Kathy

You are anxious to learn the "real foodservice business" and hope to open your own restaurant some day. When you heard about this job opening in the kitchen you immediately applied because you felt it was a good place to learn "the basics" of food preparation. You would like to work in to a cook's job when one opens up so you spend as much time as you can talking to the cooks and asking them questions. Because of being much younger than most of the other employees in the foodservice department you have tried extra hard to be friendly to everyone and to do anything they ask.

# PERFORMANCE APPRAISAL EVALUATION FORM

HANDOUT #12-2, page 8

Employee's name: Kathy Job Title: Kitchen Helper

Place of Employment: Batside High School

Starting Date: May 1980 Date of this evaluation: April 1981

## Rating Scale

- 4-Exceeds Job Requirements
- 3-Meets Job Requirements
- 2-Needs Improvement to Meet Job Requirements
- 1-Does Not Meet Minimum Requirements of Job

Using this rating scale, enter the appropriate number indicating your rating for each job characteristic listed below. Total the rating numbers for all 10 characteristics to determine overall evaluation score. There is a possible score of 40 (a score of 4 for each of the 10 traits rated).

| JOB CHARACTERISTICS(Traits)               | score    | comments                                |
|-------------------------------------------|----------|-----------------------------------------|
| 1. <u>Dependable</u>                      | <u>3</u> |                                         |
| 2. <u>Cooperative</u>                     | <u>4</u> |                                         |
| 3. <u>Takes directions well</u>           | <u>3</u> |                                         |
| 4. <u>Efficient use of work time</u>      | <u>2</u> | <u>seldom completes tasks</u>           |
| 5. <u>Completes assigned jobs</u>         | <u>1</u> | <u>frequently jobs left in-complete</u> |
| 6. <u>Pleasant job attitude</u>           | <u>3</u> |                                         |
| 7. <u>Works with minimum supervision</u>  | <u>2</u> | <u>constant need for checking back</u>  |
| 8. <u>Potential for advancement</u>       | <u>2</u> |                                         |
| 9. <u>Physically able</u>                 | <u>3</u> |                                         |
| 10. <u>Works well with fellow workers</u> | <u>3</u> |                                         |

Total Rating Score 26

General Comments:

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Employee: \_\_\_\_\_ Evaluator: \_\_\_\_\_  
 (signature) (signature) (date)

HANDOUT #12-2, page 9  
INTERVIEWERS PLANNING SHEET

1. *Opening the Communication channels...the approach*  
Find a subject of common interest...a conversation starter.  
You may state a situation...or a problem related to the interview.
2. POINT OR PURPOSE - what is this discussion all about?  
State what will be discussed...the direction and purpose of the conversation.
3. EVIDENCE - information that needs to be exchanged for clarity  
What interviewer needs to know about the situation that is not already known:  
What employee needs to know about the situation that may not be already known:  
Possible motivational factors to include:  
Possible roadblocks to the conversation:  
Personnel data that may be helpful during the evaluation of this employee may include: awards, promotions, date of hire, absentee records, sick days taken, disciplinary record (verbal reprimands), accidents on the job, incident reports from supervisors and so forth.
4. ACTION OR ACCEPTANCE - do both of us understand and accept the final message?  
What end results do I hope to achieve with this worker?  
What decision or action might be taken by worker?...by myself?

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For Observer (Person 3) - EVALUATION OF PERFORMANCE APPRAISAL  
SESSION

1. Atmosphere: Was it friendly, competitive, hostile, strained?
2. Opening: How was the session opened? How was the employee made to feel at ease?
3. Participation: Who talked the most? Did the managers "Style" affect participation in the discussion?
4. Listening: What degree of listening was taking place between the two?
5. Major Issues: Were the major issues discussed?  
Did they get off on tangents?  
Did the "boss" keep the discussion on target?  
Did the "boss" prevent evidence?
6. Understanding: What degree of understanding was established? Was the subordinate motivated to improve?
7. Results: Was a plan mutually agreed to? Was a follow-up plan agreed to? Did the interview end on a positive note?



HANDOUT #12-3

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8. Forced Choice Scale - similar to item 3 (Behavior Checklist) but includes a list of statements which the evaluator selects from during the appraisal process.

Example: a. Reports for work on time  
b. Begins work promptly  
c. Completes required amount of work  
d. Completes more than required amount of work.  
e. Organizes work well

---

NOTE: Item 4 and 6 on this list are thought to be the easiest to develop and use.

1. Supervisor Rating - immediate supervisor rates worker's performance.
2. Peer Rating - fellow workers rate a worker's performance.
3. Self-Rating - worker rates own work performance.

---

TERMINOLOGY USED ON EVALUATION FORMS SHOULD BE DEFINED AND UNDERSTOOD BY EVALUATORS

1. Productivity = How much work is done by worker or quantity of his/her production.
2. Quality = How accurate is worker, amount of waste, effective use of supplies and equipment. Don't confuse this with job knowledge or productivity.
3. Job Knowledge = How well does worker understand the job; does he have necessary skills.
4. Versatility = Can worker demonstrate a variety of tasks, both mental and physical. Is there flexibility. Can he/she change easily from task to task.
5. Dependability = How faithful is worker; his consistency on the job, attendance, punctuality. Does he/she wander about or loaf on the job.
6. Initiative = Can worker begin assignment without directions. Can he/she recognize the best way to do things. Can he/she follow-up with minimum supervision.
7. Appearance = Is personal grooming, neatness and cleanliness appropriate.
8. Personal Relationships = Can worker relate to fellow workers.

9. Cooperation with Management = Does worker accept assignments willingly.  
Does he/she feel he is "on the team"  
Does he/she have a sincere interest in  
job accomplishment.

Adapted from Employee Performance Appraisal Programs - Guidelines  
for Their Development and Implementation. American  
Hospital Association, Chicago, IL, 1971.

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LESSON 13 : LABOR UNIONS IN FOODSERVICE

GOAL OF THIS LESSON

The goal of this lesson is to understand the background and present impact of organized labor on school foodservice programs and to realize the advantages unionization can have to management.

PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. relate the early history of the American labor movement,
2. relate the early history of organized labor in the foodservice industry,
3. list rights and rules to be observed by employers and unions,
4. summarize management's viewpoint to unionization,
5. identify factors that favor unionization from management's point of view,
6. identify factors that encourage employees to join a union,
7. relate the background and growth of the American Federation of State, County and Municipal Employees (AFSCME),
8. predict a possible future direction for organized labor in our country based on government statistics, and
9. identify recommendations on how managers/directors can affectively work with unions.

INSTRUCTOR PREPARATION FOR CLASS ACTIVITIES

1. Duplicate sufficient copies of all handouts.
2. Ask participants to bring copies of their union contracts to class for comparison and discussion in activity XI during one of the class activities.

D. KEY WORDS USED IN THIS LESSON

ARBITRATION: the hearing and determining settlement of a dispute between management and the union by a person

COLLECTIVE BARGAINING: is the same as negotiating but usually is private or without media coverage to prevent public pressures from affecting outcomes.

LABOR UNION: an organization of employees formed to promote, protect and improve through collective action, the social, economic and political interest of the members.

MEDIATION: the same as collective bargaining but with an arbitrator, usually a representative of a government agency.

NATIONAL LABOR RELATION ACT - 1935: also known as the Wagner Act gave labor the power to bargain collectively, strike and gain protection of the law, with unions becoming bargaining agents and representatives of a majority of employees.

NATIONAL LABOR RELATION BOARD (NLRB): is a five member board appointed by the President of the U.S. The responsibility of the board is to administer the National Labor Relations Act, determining collective bargaining units, supervising elections and preventing union, employee and management from committing unfair labor practices.

NEGOTIATION: occurs whenever people exchange ideas, with the intention of changing relationships, or whenever they confer for agreement. It is a give and take situation with both sides being willing to compromise.

E. REFERENCES FOR ADDITIONAL INFORMATION

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3. Lundberg, D.E. and J.P. Armatas. The Management of People in Hotels, Restaurants and Clubs. 1980. Wm. C. Brown Co. Publishers, Dubuque, IA (Chapter 17).
4. Witzy, H.K. The Labor-Management Relations Handbook for Hotels, Motels, Restaurants and Institutions. 1975. Cahners Books, Boston, MA

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LESSON 13 : LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | CLASS ACTIVITY |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>I. <u>INTRODUCTION</u></p> <ul style="list-style-type: none"> <li>A. Labor unions as we know them today may be powerful organizations with memberships ranging in the hundreds of thousands.</li> <li>B. For management, the word labor union usually does not bring a positive image to mind. Present day managers-directors are seldom taught how to live with a union for the benefit of both the organization and the employees.</li> <li>C. By understanding the background of the American labor movement, perhaps a better understanding will develop.</li> </ul> <p>II. <u>BRIEF HISTORY OF THE AMERICAN LABOR MOVEMENT</u></p> <ul style="list-style-type: none"> <li>A. The labor unions of today have evolved into organizations that have their roots deep in the history of the labor movement.               <ul style="list-style-type: none"> <li>1. Unions can be traced back to the guilds of the artisans of the Middle Ages.</li> <li>2. For centuries workers of similar skill backgrounds have formed organizations to govern entry of newcomers into an occupation by defining standards of occupational conduct.</li> </ul> </li> </ul> | <p>212</p>     |

LESSON 13: LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | CLASS ACTIVITY |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>3. Several strong leaders also emerged during this time such as John L. Lewis (mine workers) and Walter Reuther (auto workers).</p> <p>4. The immigration rate declined at this time which had always provided vast numbers of unskilled workers.</p> <p>E. The Congress of Industrial Organizations (CIO) was born in 1935. The strategy of this organization differed in that they attempted to organize all workers in a company or organization rather than focus on a certain skill group as the AFL had done.</p> <p>F. In the late 1940's these two organizations began to realize that their energies should focus together, so in 1955 they merged.</p> |                |
| <p>II. <u>BRIEF HISTORY OF THE AMERICAN FOODSERVICE LABOR MOVEMENT</u></p> <p>A. Between 1860 and 1870 societies of cooks and waiters organized in several major American cities and in 1887 a number of local unions affiliated with the AFL.</p> <p>1. Among those represented were the trades of waiters, cooks, bartenders and bakers.</p>                                                                                                                                                                                                                                                                                                                      |                |

LESSON 13: LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | CLASS ACTIVITY |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>2. In the early 1890's these small locals amalgamated to form the "Hotel and Restaurant Employees' National Alliance".</p> <p>B. In 1937 a major hotel strike called in San Francisco which had almost 10,000 workers off their jobs for 89 days. During this same time in Detroit, the Statler and Book-Cadillac Hotels experienced "sit-in" strikes patterned after the successful automative "sit-ins".</p> <p>C. In 1937 a major breakthrough was achieved in a foodservice union contract between workers and foodservice operators in New York City. This contract provided, among other things, for a 48 hour work week for most kitchen workers, a 54 hour work week for waiters and busboys, and a six-day work week.</p> <p>D. Prior to 1959 the food and hotel industry operated under the jurisdiction of various state labor laws, but now it falls under the National Labor Relations Board (NLRB) which is the Federal agency that monitors all labor activity in the United States.</p> | <p>214</p>     |

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# LESSON 13: LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | CLASS ACTIVITY                                                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <p>IV. <u>WHAT ARE THE RULES THAT MUST BE FOLLOWED BY MANAGEMENT AND WORKERS?</u></p> <p>The Taft-Hartley Act of 1935 specifies the rights of employees to join organizations and to bargain collectively through representatives of their own choosing and defines what will be considered unfair labor practices by both labor and management.</p> <p>A. <u>The employer:</u></p> <ol style="list-style-type: none"> <li>1. may not interfere with, restrain, or coerce employees regarding their right of self-organization and collective bargaining.</li> <li>2. cannot dominate or interfere with the formation of a labor organization and cannot contribute financially to its support.</li> <li>3. may not discriminate in hiring or retaining an employee as a matter of encouraging or discouraging membership in a labor organization, and</li> <li>4. may not discharge or otherwise discriminate against an employee who has filed charges against the employer or given testimony under the Taft-Hartley Act.</li> </ol> | <p>181</p> <p>Distribute Handout #13-1 as you discuss these issues and ask participants to explain with an example what each item means.</p> |

# LESSON 13: LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | CLASS ACTIVITY |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>B. <u>The union may not:</u></p> <ol style="list-style-type: none"> <li>1. restrain or coerce employees in their collective bargaining rights, nor may the union restrain or coerce an employer in the selection of representatives for the purposes of collective bargaining or for the adjustment of grievances,</li> <li>2. refuse to bargain collectively with an employer if the union represents the employees,</li> <li>3. influence employees to strike or otherwise try to force an employee or self-employed person to join a union or employee organization, and</li> <li>4. force or require an employer to recognize or bargain with a particular union if another union is already certified to represent those employees.</li> </ol> <p>V. <u>MANAGEMENT'S USUAL VIEWPOINT ABOUT UNIONS</u></p> <ol style="list-style-type: none"> <li>A. If given a choice, management (directors and managers) generally prefer not dealing with a union because they feel unions are in business to get more wages, benefits and rights for employees.</li> <li>B. They see unions as a threat to management's rights.</li> </ol> | <p>216</p>     |



## LESSON 13: LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | CLASS ACTIVITY                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>C. A summary of role of employer, employee and union provides understanding for operational procedure.</p> <p>VI. <u>FACTORS FAVORING UNIONIZATION</u></p> <p>A. Management, in some instances, may welcome a union contract because of the following reasons:</p> <ol style="list-style-type: none"> <li>1. The union contract establishes guidelines in that management has definite rights and responsibilities specified, and so do employees.</li> <li>2. Wages and hours worked are clearly specified.</li> <li>3. Benefits are specifically spelled out.</li> <li>4. Grievances are defined and procedures for resolving them are detailed.</li> <li>5. The union may also be a good source of employees, especially for temporary or call-in workers.</li> </ol> <p>B. Management should recognize the factors that favor unionization.</p> <p>VII. <u>EMPLOYEE'S USUAL VIEWPOINT ABOUT UNIONS</u></p> <p>A. The union's biggest appeal, of course, is to the employee's pocketbook. Strongly unionized communities and businesses usually have higher wage rates than those that are non-union.</p> | <p>Review together Handout #13-2 Role Identification</p> <p>A discussion by the group may provide some understanding for other than their own group.</p> |

LESSON 13: LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | CLASS ACTIVITY |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <p>B. There may be greater job security and more benefits than if the union were not present.</p> <p>C. Better working conditions may also exist in unionized organizations.</p> <p>D. Better or specific working hours with more stable employment frequently exist if a union is present.</p> <p>E. Additional worker grievances that favor joining a union include:</p> <ol style="list-style-type: none"><li>1. favoritism of certain worker's by management.</li><li>2. overtime problems either forced by management or given only to favored workers.</li><li>3. nepotism or hiring family or close friends whether qualified for the job or not.</li><li>4. poor employee scheduling resulting in overwork for some and insufficient work for others.</li><li>5. poor equipment which is old, broken or both which may be dangerous to use unless repaired or replaced.</li><li>6. lack of training or being put on a job without proper training which could be dangerous to the worker or fellow employees.</li></ol> | <p>213</p>     |

LESSON 13: LABOR UNIONS IN FOODSERVICE

| LESSON CONTENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | CLASS ACTIVITY |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <ul style="list-style-type: none"><li>7. criticism of employees in front of other workers, and</li><li>8. the indifference and ineptitude of management that is an attitude of not caring by management along with lack of technical skills or knowledge for the jobs being done.</li></ul> <p>F. This list of worker grievance is not limited to hourly or "bluecollar" workers.</p> <ul style="list-style-type: none"><li>1. Salaried or management employees may suffer from some of the same complaints.</li><li>2. If their superiors fail to listen, workers may be encouraged to organize into a group in order to be heard.</li><li>3. Unions involving various professional jobs have been increasing every year.</li><li>4. Teachers and nurses are examples of professional workers who have been unionized for many years. Even college and university professors are unionized on some campuses.</li></ul> | <p>589</p>     |

## LESSON 13: LABOR UNIONS IN FOODSERVICE

### LESSON CONTENT

### CLASS ACTIVITY

#### VIII. EMPLOYEES IN COMMUNITY SERVICE

- A. For many years it was illegal for public employees to join a union but this has changed due to pressure from this employee group and a change in the labor laws.
- B. Public employment appears to be the fastest growing segment of the labor force. In the 20 years between 1947 and 1967 the number of public employees at all levels (federal, state and local government) increased by over 110%. During this same period private employment increased by only 42%.
- C. Obviously governmental employees have problems too with wages, hours and working conditions similar to those of employees working in the private sector of business and industry.

#### IX. THE AMERICAN FEDERATION OF STATE, COUNTY AND MUNICIPAL EMPLOYEES

- A. One of the earliest public employees' union that still survives today is the American Federation of State, County and Municipal Employees, better known as AFSCME.

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LESSON CONTENT

CLASS ACTIVITY

B. It is a part of the AFL-CIO and was founded' in 1937.

1. During the 1950's its membership doubled and by 1967 the AFSCME was growing at about 1000 members per week.
2. At its 1970 convention, the union reported a membership of over 460,000 making it the fastest growing union within the AFL-CIO.
3. It is among the 10 largest unions in the country.

C. AFSCME has over 1900 locals in 45 states.

X. THE FUTURE OF ORGANIZED LABOR

- A. To be successful, a union must continue to grow and increase its membership.
1. This goal is achieved through improving members' economic conditions.
  2. Recent information from the United States Dept. of Labor, Bureau of Labor Statistics, shows that at least for the present, the relative proportion of union members among labor-force participants is declining.
  3. Based on these government figures, it would appear that organized labor may not grow as much in our current decade as it has in recent past



LESSON 13: LABOR UNIONS IN FOODSERVICE

LESSON CONTENT

decades.

- B. Perhaps union growth has peaked and will now remain constant or even show decreases as management becomes more skilled in the intricacies of labor management and human relations.

XI. RECOMMENDATIONS FOR MANAGEMENT...HOW TO AFFECTIVELY WORK WITH UNIONS

- A. Know all the details and provisions of your contract. Ignorance of the contract basics has caused unfounded grievances for many manager/directors.
- B. Make sure all of your workers have copies of the union contract and that they have read it and understand it. If workers are not familiar with its details, they may bring issue over incidents that are thoroughly discussed in the contract. Having both management and workers fully aware of all contract details saves time and energy for all those involved in unfounded grievances.

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CLASS ACTIVITY

Using copies of union contracts brought in by participants, discuss:

1. the ease of use including page and print size
2. how easily understood including simplicity of language, format used, and ease of finding specific information from an index or table of contents.
3. look up the following information in each contract.
  - .retirement benefits
  - .sick days and medical benefits
  - .disciplinary procedures
  - .union dues (how much and how collected)
4. recommend suggestions for improving the usability of each contract reviewed.

LESSON 13: LABOR UNIONS IN FOODSERVICE

LESSON CONTENT

- C. If your school district is not unionized but you become aware of attempts to unionize, seek legal council from someone who is very familiar with labor laws and can assist. There are definite laws controlling the actions of both management and workers in unionization attempts and you should become aware of them if such a situation should arise.

CLASS ACTIVITY

HANDOUT #13-1

THE RIGHTS OF MANAGEMENT AND EMPLOYEES

(Based on the Taft-Hartley Act of 1935)

THE EMPLOYER:

1. may not interfere with, restrain, or coerce employees regarding their right of self-organization and collective bargaining.
2. cannot dominate or interfere with the formation of a labor organization and cannot contribute financially to its support.
3. may not discriminate in hiring or retaining an employee as a matter of encouraging or discouraging membership in a labor organization, and
4. may not discharge or otherwise discriminate against an employee who has filed charges against the employer or given testimony under the Taft-Hartley Act.

THE UNION MAY NOT:

1. restrain or coerce employees in their collective bargaining rights, nor may the union restrain or coerce an employer in the selection of representatives for the purposes of collective bargaining or for the adjustment of grievances,
2. refuse to bargain collectively with an employer if the union represents the employees,
3. influence employees to strike or otherwise try to force an employee or self-employed person to join a union or employee organization, and
4. force or require an employer to recognize or bargain with a particular union if another union is already certified to represent those employees.

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HANDOUT #13-2

IDENTIFICATION OF ROLES OF MANAGEMENT, OF EMPLOYEE-UNION

1. Once the election of a union as a bargaining agent has occurred, the role of the employer and employee changes.
  - a. Employer has to represent capital and ownership as well as dealing with a new partner.
  - b. Employees become united and are committed to common goals of representing all members as a group. Dual loyalties to management and labor.
2. New management role and function of a union.
  - a. Employer must keep in mind the role and influence of the union in all forms of his formal and informal communication with employees.
  - b. Union acts as a screening and filtering agent. Setting in judgment of management's actions and at the same time protecting employees.
3. The communication process
  - a. the Employer when communicating directly with the Employee must be aware of the union contract terms to not be in conflict with the agreement.
  - b. Employee must communicate with management as a group effort and not individual communication.
4. Leadership role
  - a. Employer must maintain control of operational procedures plus adding another dimension of the union.
  - b. Union leadership promises benefits and protection thus assuming a political position as spokesman for other employees.
5. Dual allegiance a result of unionization
  - a. Employees are torn between two ideologies, management and labor both demand loyalty.
  - b. dual leadership is impossible.



6. Some opinions people have concerning management role
  - a. Management is an economic service as well as having a social responsibility to the community.
  - b. Variation on meaning of corporation wealth survey published by U.S. News and World Report states most people believe corporations receive 75% after expenses are paid and employees receive 25%.
7. Labor agreement
  - a. Have provisions or clauses which defines and limits the rights of management. The Supreme Court in 1960 declared management rights can be limited to those stated in the contract.
  - b. Management rights may include overtime, discipline, discharge, work schedules, evaluation, use of tests, determine standards however it is essential to spell out policy in the negotiation of the contract.
  - c. Misuse of management rights occur in day to day bargaining on the contract and mistakes made during negotiations.
8. Appropriate measures for developing cooperation between union and management
  - a. Management can
    1. recognize the union as a legal right to represent people
    2. be responsible for not making anti-union statements
    3. act in good faith when dealing with union
    4. provide unions with an opportunity to input in the improvement of basic problems - absenteeism, turnover, waste, safety and health.
  - b. The union can
    1. be aware that power brings responsibilities
    2. educate membership on the terms and conditions of the contract
    3. show a respect for management



4. reinforce to the membership the social significance and responsibility of labor's representatives.

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LESSON 14 : PROGRESS TEST 3 FOR LESSONS 11, 12 and 13 ON PERSONNEL MANAGEMENT

GOAL OF THIS LESSON

The goal of this lesson is to review the most important aspects of the past 3 lessons, by administering the following Progress Test.

PURPOSE OF THIS LESSON

After completing this lesson, the participants should be able to:

1. Summarize and review the important information presented in Lessons 11, 12 and 13
2. Emphasize the most important points presented in Lessons 11, 12 and 13
3. Identify subject areas in which participants desire or need further study and practice.

NOTE: The Progress Test should NOT scare or humiliate participants or be used as a device to keep them from continuing on with further lessons. There is no minimum score of success. This is an exercise or learning activity just as the other lessons have been.

C. INSTRUCTOR PREPARATION FOR CLASS PROGRESS TEST

1. The time allowed for this lesson is approximately 25 minutes.
2. Duplicate sufficient copies of Progress Test.
3. How the Progress Test should be given:
  - A. Pass out copies of the Progress Test to each participant
  - B. Provide pens or pencils for those who may not have brought their own.
  - C. Explain that the reason for this Progress Test is to review the important information presented in the past three lessons.
  - D. Briefly go through the test together to explain the different kinds of questions to be sure that all participants know what they need to do for each question.
  - E. Allow approximately 25 minutes for participants to complete the test.
  - F. Allow participants to keep their own test while answers are discussed.
  - G. State aloud which answer(s) are correct for each question.
  - H. Discuss how to change false statements so they read "true".
  - I. Lead a class discussion relating to reasons why other choices, if given, are incorrect. Ask participants to give examples of the application of each question to their school foodservice situation.
  - J. Allow any participants who desire to do so to retake the test on their own time.
  - K. Provide additional references on any topic to participants who desire further information.

PROGRESS TEST 3 - PERSONNEL MANAGEMENT

This test covers Lessons 11, 12 and 13. Select (check) all of the correct answers to each question. Some questions have more than one answer.

1. A work schedule has several purposes and includes:
  - a. assigning job tasks by seniority
  - b. decreasing food costs at least 2%
  - c. informing employees of what work is to be done by what time
  - d. insuring maximum utilization of an employee's time on duty
2. A work schedule:
  - a. always lowers total labor hours required for production
  - b. decreases the possibility of a job being left undone
  - c. helps develop cooperation between various stations in the kitchen
  - d. is an aid in training new employees
3. There are several steps in the complete evaluation process. Number the following steps in the correct order.
  - a. gather data on performance of employee
  - b. make decisions on future goals for employees
  - c. establish performance standards for each job
  - d. evaluate employee
  - e. discuss evaluation with employee
4. The benefits of a sound performance appraisal program include:
  - a. decreases employee turnover
  - b. increases employee grievances and complaints
  - c. increases employee productivity
  - d. helps identify where training is needed
5. During a performance appraisal, a manager/director should:
  - a. begin on a positive topic
  - b. discuss the negative points first to get them over with
  - c. do most of the talking so the employee knows who is boss
  - d. end on a positive topic

Progress Test 3 - Personnel Management, page 2

6. Identify the true statement(s) below.
  - a. CIO stands for Commission of International Occupations
  - b. labor unions began in New York City in 1895.
  - c. The American Federation of Labor (AFL) is the oldest labor union that is still in existence.
  - d. unions really became active during the 1930's as a result, partly, of the Depression.
7. Select the true statement(s) below.
  - a. there are managerial advantages to having a unionized organization.
  - b. the strength-of foodservice unions today is many times augmented by the Teamster's Union.
  - c. the Taft-Hartley Act of 1935 outlawed union formation completely.
  - d. unions for cooks and foodservice workers did not begin until 1939.
8. Workers may favor unionization because of
  - a. decreased job stability
  - b. lower benefits received but higher wages
  - c. poor training programs provided by management
  - d. worker favoritism by management
9. Identify the true statement(s) below
  - a. AFSCME is part of the AFL-CIO
  - b. AFSCME is considered a very small union on a national scale today.
  - c. public employee unions have been very slow to grow in the last 20 years.
  - d. statistics from the Bureau of Labor indicate a general decrease in union growth during the past decade.

Your score \_\_\_\_\_



PROGRESS TEST 3 - PERSONNEL MANAGEMENT

ANSWER KEY

1. c,d
2. b,c,d
3. a - 2  
b - 5  
c - 1  
d - 3  
e - 4
4. a,c,d
5. a,d
6. c,d
7. b,c
8. c,d
9. a,d

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## APPENDIX I

### HOW TO MAKE MEETINGS MEANINGFUL

by

H. Kent Baker

Excerpted from: Management Review 68:45-47,  
August, 1979

Fill in the blank with a few descriptive words:

"I feel most meetings I attend are \_\_\_\_\_."

If your response is typical, it will be negative. People tend to view meetings as dull, inefficient, disorganized, overlong, and unproductive. However, a quick audit of your business meeting habits may help to spend less time in meetings and get more out of those you do attend.

Few organizational activities waste more time than meetings. Unfortunately, many meetings should not be held at all. Sometimes the only rationale for a weekly staff meeting is because a week has elapsed. The cost of salaries, time, disrupted work schedules, lack of accessibility, and interrupted communications make inefficient meetings expensive indeed.

Making meetings more meaningful starts with identifying the reasons they fall flat. The following questions can help isolate basic problems.

Do you suffer from "meetingitis"?

The symptoms include constantly running from one meeting to another, and rarely having enough time to do your job. The remedy starts with reducing the number of meetings you attend or conduct.

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Ask, "What would happen if I didn't attend this meeting?" If the answer is, "Nothing," don't go. If you cannot attend an important meeting, send a representative.

Attend only the portion of the meeting useful to you. Request an assigned time to make a report instead of staying for the entire meeting.

Finally, if you conduct meetings, analyze alternatives to holding them. Eliminate those that have become rituals or have outlived their usefulness.

Do meetings last too long?

Meetings that last more than one and one-half to two hours lose their effectiveness. Maintaining attention much beyond two hours is difficult because participants lose interest or become physically tired. Also, meetings that extend beyond the allotted time become less productive as participants become concerned over other matters, such as appointments, work deadlines, or generally spending time more productively.

Is the atmosphere conducive to discussion?

Although a good physical environment cannot guarantee a successful meeting, the lack of proper seating, temperature, lighting, and other physical factors can be great handicaps. Distractions such as ringing telephones or late arrivals can make it difficult to concentrate.

Similarly, according to studies, the angles at which participants sit make for hostility or open exchange. A face-to-face seating across a table increases opposition, conflict, and disagreement.

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Sitting side-by-side makes confrontations less likely. Likewise, a classroom arrangement is good for reporting, but not for problem discussion. A circular seating pattern, with no one dominant position, fosters communication and openness.

Besides the physical aspects, meetings, can fail because superior/subordinate relationships inhibit the free flow of ideas. Subordinates may be afraid to speak and senior members may monopolize the discussion; excellent suggestions may go unheard. Simply calling on junior managers first can help.

Does the leader know how to conduct a meeting?

Often meetings are not successful because the leader does not have all the required skills. To deal with the tasks at hand and the people involved, leaders must be responsible for the following:

- Preparing the agenda.
- Making sure all attendees understand the meeting objectives.
- Providing a structure for discussion of issues.
- Seeking clarification of issues.
- Keeping the discussion on track.
- Terminating discussion when appropriate.
- Summarizing what has been accomplished.
- Providing a record of the meeting.
- And, possibly, insuring that the agreed-upon actions are carried out.

However, the leader is not totally responsible for a meeting's success. While an overly dogmatic leader can impede decision making, each participant can contribute to or hamper the meeting as well.

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### GUIDELINES FOR SUCCESSFUL MEETINGS

While not applicable to all meetings, the following guidelines suggest ways to improve the meetings you do attend, at each step of the way:

#### Determine alternatives to holding the meeting.

A meeting is not the only way to communicate or to solve problems. Investigate alternatives, such as writing a memo or personally discussing the issues with key individuals.

Similarly, before calling the meeting, find out what it really will cost all participants. The realization of these high costs can be sufficient to encourage alternatives.

#### Clearly establish the purpose.

If the purpose is unclear, it is doubtful that it will be clarified during the meeting. Both the reasons for holding the meeting and its potential results should be determined in advance.

#### Limit attendance.

Effectiveness frequently diminishes as size increases. Four to seven attendees seems to be ideal, while ten to twelve tends to be the upper limit. In some cases, people do not have to be present for the entire meeting. The period they should be present should be specified.

#### Distribute the agenda in advance.

A lack of preparation may often be attributed to the failure to provide an agenda in advance or to its brevity. Each item on the agenda should be sufficiently detailed to tell what will really be discussed. Labeling items "for information," "for discussion," or "for decision" will also clarify their nature.

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However, an agenda should not be distributed too far in advance, unless considerable preparation is required. Two or three days before the meeting is usually enough.

Circulate background material.

Only short documents should be introduced during the meeting. Lengthy ones should be distributed to each attendee beforehand to allow adequate preparation.

Choose an appropriate meeting time.

Timing is important in determining a meeting's effectiveness. Scheduling a problem-solving meeting late in the day can be self-defeating; participants may be too tired to put forth their best. But meetings that tend to run over their allotted times should be scheduled before lunch or near the end of the day; this provides additional incentives to keep them short and to stay on the subject.

Place a time limit on the meeting and on each item.

Because of the tendency to devote time to tasks in inverse proportion to their importance, time limits help prevent spending inordinate time on one issue. Also, participants need to know starting and ending times of the meeting to plan their schedules.

DURING THE MEETING

Start and end on time.

Starting late not only wastes time, but it reinforces those who came late and penalized those who arrive on time.

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Place important items at the top of the agenda.

People tend to be more creative at the beginning of the meeting. Concentrating on the priorities also helps ensure that they will be considered.

Stick to the agenda.

To avoid getting sidetracked in irrelevant discussion, the leader should monitor the meeting. Self-imposed silence can be inaugurated after the presentation of a serious question or problem to encourage listening and thinking rather than talking and immediate reaction. In addition, the leader should control interruptions and terminate rambling discussion.

Assign time keeping and minutes responsibilities.

Someone other than the leader should record the minutes and make sure any topic does not go over its allotted discussion time. These responsibilities may reduce a person's participation and should be rotated.

End the meeting with a unifying or positive issue.

The leader should be aware of which items tend to unite and which tend to divide. Arrange the agenda to end on a positive note.

Summarize what has been accomplished.

This provides some feedback on how well the meeting has met its objectives. As meetings accomplish more and more, participants should be positively reinforced about them.

Coordinate the time of the next meeting.

If another one is called for, determining the time

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and place while all the participants are present can reduce your coordination effort considerably.

#### AFTER THE MEETING

##### Provide timely and complete minutes.

Usually, they should be prepared and distributed within 24 hours. This quick action reaffirms the importance of the meeting and helps reduce errors due to the recorder's memory. Minutes should be in sufficient depth to recount the major happenings.

##### Follow through on decisions.

Don't assume that decisions are automatically carried out. The leader should monitor the progress of agreed-upon actions.

##### Conduct a periodic evaluation of your meetings.

A meeting audit can help determine not only what has been accomplished towards improving meetings but what further steps are needed. Once you have solved preliminary meeting problems, you can move on to the more complex ones.

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HOW TO RUN A MEETING

by

Antony Jay

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*Why is it that any single meeting may be a waste of time, an irritant, or a barrier to the achievement of an organization's objectives? The answer lies in the fact, as the author says, that "all sorts of human cross-currents can sweep the discussion off course and errors of psychology and technique on the chairman's part can defeat its purposes." This article offers guidelines on how to right things that go wrong in meetings. The discussion covers the functions of a meeting, the distinctions in size and type of meetings, ways to define the objectives, making preparations, the chairman's role, and ways to conduct a meeting that will achieve its objectives.*

Why have a meeting anyway? Why indeed? A great many important matters are quite satisfactorily conducted by a single individual who consults nobody. A great many more are resolved by a letter, a memo, a phone call, or a simple conversation between two people. Sometimes five minutes spent with six people separately is more effective and productive than a half-hour meeting with them all together.

Certainly a great many meetings waste a great deal of everyone's time and seem to be held for historical rather than practical reasons; many long-established committees are little more than memorials to dead problems. It would probably save no end of managerial time if every committee had to discuss its own dissolution once a year, and put up a case if it felt it should continue for another twelve months. If this requirement did nothing else, it would at least refocus the minds of the committee members on their purposes and objectives.

But having said that, and granting that "referring the matter to a committee" can be a device for diluting authority, diffusing responsibility and delaying decisions, I cannot deny that meetings fulfill a deep human need. Man is a social species. In every organization and every human culture of which we have record,

people come together in small groups at regular and frequent intervals, and in larger "tribal" gatherings from time to time. If there are not meetings in the places where they work, people's attachment to the organizations they work for will be small, and they will meet in regular formal or informal gatherings in associations, societies, teams, clubs, or pubs when work is over.

This need for meetings is clearly something more positive than just a legacy from our primitive hunting past. From time to time, some technomaniac or other comes up with a vision of the executive who never leaves his home, who controls his whole operation from an all-electronic, multichannel, microwave, fiber-optic video display dream console in his living room. But any manager who has ever had to make an organization work greets this vision with a smile that soon stretches into a yawn.

There is a world of science fiction, and a world of human reality; and those who live in the world of human reality know that it is held together by face-to-face meetings. A meeting still performs functions that will never be taken over by telephones, teleprinters, Xerox copiers, tape recorders, television monitors, or any other technological instruments of the information revolution.

#### Functions of a Meeting

At this point, it may help us understand the meaning of meetings if we look at the six main functions that meetings will always perform better than any of the more recent communication devices:

1. In the simplest and most basic way, a meeting defines the team, the group, or the unit. Those present belong to it; those absent do not. Everyone is able to look around and perceive the whole group and sense the collective identity of which he or she forms a part. We all know who are--whether we are on the board of Universal International, in the overseas sales department of Flexitube, Inc., a member of the school management committee, on the East Hampton football team, or in Section No. 2 of Platoon 4, Company B.
2. A meeting is the place where the group revises, updates, and adds to what it knows as a group. Every group creates its own pool of shared knowledge, experience, judgment, and folklore. But the pool consists only of what the individuals have experienced or discussed as a group--i.e., those things which every individual knows that all the others know too. This pool not only helps all

members to do their jobs more intelligently, but it also greatly increases the speed and efficiency of all communications among them. The group knows that all special nuances and wider implications in a brief statement will be immediately clear to its members. An enormous amount of material can be left unsaid that would have to be made explicit to an outsider. But this pool needs constant refreshing and replenishing, and occasionally the removal of impurities. So the simple business of exchanging information and ideas that members have acquired separately or in smaller groups since the last meeting is an important contribution to the strength of the group. By questioning and commenting on new contributions, the group performs an important "digestive" process that extracts what's valuable and discards the rest.

Some ethologists call this capacity to share knowledge and experience among a group "the social mind", conceiving it as a single mind dispersed among a number of skulls. They recognize that this "social mind" has a special creative power, too. A group of people meeting together can often produce better ideas, plans, and decisions than can a single individual, or a number of individuals, each working alone. The meeting can of course also produce worse outputs or none at all, it is a bad meeting.

However, when the combined experience, knowledge, judgment, authority and imagination of a half dozen people are brought to bear on issues, a great many plans and decisions are improved and sometimes transformed. The original idea that one person might have come up with singly is tested, amplified, refined, and shaped by argument and discussion (which often acts on people as some sort of chemical stimulant to better performance), until it satisfies far more requirements and overcomes many more objections than it could in its original form.

3. A meeting helps every individual understand both the collective aim of the group and the way in which his own and everyone else's work can contribute to the group's success.
4. A meeting creates in all present a commitment to the decisions it makes and the objectives it pursues. Once something has been decided, even if you originally argued against it, your membership in the group entails an obligation to accept the decision. The alternative is to leave the group, but in practice this is very rarely a dilemma of significance. Real opposition to decisions within organizations usually consists of one part disagreement with the decision to nine parts resentment at not being consulted

before the decision. For most people on most issues, it is enough to know that their views were heard and considered. They may regret that they were not followed, but they accept the outcome.

And just as the decision of any team binding on all the members, so the decisions of a meeting of people higher up in an organization carry a greater authority than any decision by a single executive. It is much harder to challenge a decision of the board than of the chief executive acting on his own. The decision-making authority of a meeting is of special importance for long-term policies and procedures.

5. In the world of management, a meeting is very often the only occasion where the team or group actually exists and works as a group, and the only time when the supervisor, manager, or executive is actually perceived as the leader of the team, rather than as the official to whom individuals report. In some jobs the leader does guide his team through his personal presence--not just the leader of a pit gang or construction team, but also the chef in the hotel kitchen and the maitre d'hotel in the restaurant, or the supervisor in a department store. But in large administrative headquarters, the daily or weekly meeting is often the only time when the leader is ever perceived to be guiding a team rather than doing a job.
6. A meeting is a status arena. It is no good to pretend that people are not or should not be concerned with their status relative to the other members in a group. It is just another part of human nature that we have to live with. It is not an insignificant fact that the word order means (a) hierarchy or pecking order; (b) an instruction or command; and (c) stability and the way things ought to be, as in "put your affairs in order," or "law and order." All three definitions are aspects of the same idea, which is indivisible.

Since a meeting is so often the only time when members get the chance to find out their relative standing, the "arena" function is inevitable. When a group is new, has a new leader, or is composed of people like department heads who are in competition for promotion and who do not work in a single team outside the meeting, "arena behavior" is likely to figure more largely, even to the point of dominating the proceedings. However, it will hardly signify with a long-established group that meets regularly.

Despite the fact that a meeting can perform all of the fore-



going main functions, there is no guarantee that it will do so in any given situation. It is all too possible that any single meeting may be a waste of time, an irritant, or a barrier to the achievement of the organization's objectives.

#### What sort of meeting?

While my purpose in this article is to show the critical points at which most meetings go wrong, and to indicate ways of putting them right, I must first draw some important distinctions in the size and type of meetings that we are dealing with.

Meetings can be graded by size into three broad categories: (1) the assembly--100 or more people who are expected to do little more than listen to the main speaker or speakers; (2) the council--40 or 50 people who are basically there to listen to the speaker or speakers but who can come in with questions or comments and who may be asked to contribute something on their own account; and (3) the committee--up to 10 (or at the most 12) people, all of whom more or less speak on an equal footing under the guidance and control of a chairman.

We are concerned in this article only with the "committee" meeting, though it may be described as a committee, a subcommittee, a study group, a project team, a working party, a board, or by any of dozens of other titles. It is by far the most common meeting all over the world, and can perhaps be traced back to the primitive hunting band through which our species evolved. Beyond doubt it constitutes the bulk of the 11 million meetings that--so it has been calculated--take place every day in the United States.

Apart from the distinction of size, there are certain considerations regarding the type of meeting that profoundly affect its nature. For instance.

*Frequency* - A daily meeting is different from a weekly one, and a weekly meeting from a monthly one. Irregular, ad hoc, quarterly, and annual meetings are different again. On the whole, the frequency of meetings defines--or perhaps even determines--the degree of unity of the group.

*Composition* - Do the members work together on the same project, such as the nursing and ancillary staff on the same ward of a hospital? Do they work on different but parallel tasks, like a meeting of the company's plant managers or regional sales managers? Or are they a diverse group--strangers to each other, perhaps--



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united only by the meeting itself and by a common interest in realizing its objectives?

*Motivation* - Do the members have a common objective in their work, like a football team? Or do they to some extent have a competitive working relationship, like managers of subsidiary companies at a meeting with the chief executive, or the heads of research, production, and marketing discussing finance allocation for the coming year? Or does the desire for success through the meeting itself unify them, like a neighborhood action group or a new product design committee?

*Decision process* - How does the meeting group ultimately reach its decisions? By a general consensus, "the feeling of the meeting"? By a majority vote? Or are the decisions left entirely to the chairman himself, after he has listened to the facts, opinions, and discussions?

#### Kinds of meetings

The experienced meeting-goer will recognize that, although there seem to be five quite different methods of analyzing a meeting, in practice there is a tendency for certain kinds of meetings to sort themselves out into one of three categories. Consider:

The *daily meeting*, where people work together on the same project with a common objective and reach decisions informally by general agreement.

The *weekly or monthly meeting*, where members work on different but parallel projects and where there is a certain competitive element and a greater likelihood that the chairman will make the final decision himself.

The *irregular, occasional, or "special project" meeting*, composed of people whose normal work does not bring them into contact and whose work has little or no relationship to the others'. They are united only by the project the meeting exists to promote and motivated by the desire that the project should succeed. Though actual voting is uncommon, every member effectively has a veto.

Of these three kinds of meeting, it is the first--the workplace type--that is probably the most common. It is also, oddly enough, the one most likely to be successful. Operational imperatives usually ensure that it is brief, and the participants' experience of working side by side ensures that communication is good.

The other two types are a different matter. In these meetings all sorts of human crosscurrents can sweep the discussion off course, and errors of psychology and technique on the chairman's part can defeat its purposes. Moreover, these meetings are likely to bring together the more senior people and to produce decisions that profoundly affect the efficiency, prosperity, and even survival of the whole organization. It is, therefore, toward these higher-level meetings that the lessons of this article are primarily directed.

#### Before the meeting

The most important questions you should ask is: "What is this meeting intended to achieve?" You can ask it in different ways-- "What would be the likely consequences of not holding it?" "When it is over, how shall I judge whether it was a success or a failure?" --but unless you have a very clear requirement from the meeting, there is a grave danger that it will be a waste of everyone's time.

#### Defining the objective

You have already looked at the six main functions that all meetings perform, but if you are trying to use a meeting to achieve definite objectives, there are in practice only certain types of objectives it can really achieve. Every item on the agenda can be placed in one of the following four categories, or divided up into sections that fall into one or more of them:

1. *Informative-digestive*--Obviously, it is a waste of time for the meeting to give out purely factual information that would be better circulated in a document. But if the information should be heard from a particular person, or if it needs some clarification and comment to make sense of it, or if it has deep implications for the members of the meeting, then it is perfectly proper to introduce an item onto the agenda that requires no conclusion, decision or action from the meeting; it is enough, simply, that the meeting should receive and discuss a report.

The "informative-digestive" function includes progress reports--to keep the group up to date on the current status of projects it is responsible for or that affect its deliberations--and review of completed projects in order to come to a collective judgment and to see what can be learned from them for the next time.

2. *Constructive-originate*--This "What shall we do?" function embraces all items that require something new to be devised, such as a new policy, a new strategy, a new sales target, a new product, a new marketing plan, a new procedure, and so forth.

This sort of discussion asks people to contribute their knowledge, experience, judgment, and ideas. Obviously, the plan will probably be inadequate unless all relevant parties are present and pitching in.

3. *Executive responsibilities*--This is the "How shall we do it?" function, which comes after it has been decided what the members are going to do; at this point, the executive responsibilities for the different components of the task have to be distributed around the table. Whereas in the second function the contributors' importance is their knowledge and ideas, here their contribution is the responsibility for implementing the plan. The fact that they and their subordinates are affected by it makes their contribution especially significant.

It is of course possible to allocate these executive responsibilities without a meeting, by separate individual briefings, but several considerations often make a meeting desirable:

First, it enables the members as a group to find the best way of achieving the objectives.

Second, it enables each member to understand and influence the way in which his own job in with the jobs of the others and with the collective task.

Third, if the meeting is discussing the implementation of a decision taken at a higher level, securing the group's consent may be of prime importance. If so, the fact that the group has the opportunity to formulate the detailed action plan itself may be the decisive factor in securing its agreement, because in that case the final decision belongs, as it were, to the group. Everyone is committed to what the group decides and is collectively responsible for the final shape of the project, as well as individually answerable for his own part in it. Ideally, this sort of agenda item starts with a policy, and ends with an action plan.

4. *Legislative framework*: Above and around all considerations of "What to do" and "How to do it", there is a framework--a departmental or divisional organization--and a system of rules, routines, and procedures within and through which all the activity takes place. Changing this framework and introducing a new organization or new procedures can be deeply disturbing to committee members and a threat to their status and long-term security. Yet leaving it unchanged can stop the organization from adapting to a changing world. At whatever level this

change happens, it must have the support of all the perceived leaders whose groups are affected by it.

The key leaders for this legislative function must collectively make or confirm the decision; if there is any important dissent, it is very dangerous to close the discussion and make the decision by decree. The group leaders cannot expect quick decisions if they are seeking to change the organization framework and routines that people have grown up with. Thus they may be prepared to leave these items unresolved for further discussion and consultation. As Francis Bacon put it--and it has never been put better--"Counsels to which time has not been called, time will not ratify."

#### Making preparations

The four different functions just discussed may of course be performed by a single meeting, as the group proceeds through the agenda. Consequently, it may be a useful exercise for the chairman to go through the agenda, writing beside each item which function it is intended to fulfill. This exercise helps clarify what is expected from the discussion and helps focus on which people to bring in and what questions to ask them.

#### People

The value and success of a committee meeting are seriously threatened if too many people are present. Between 4 and 7 is generally ideal, 10 is tolerable, and 12 is the outside limit. So the chairman should do everything he can to keep numbers down, consistent with the need to invite everyone with an important contribution to make.

The leader may have to leave out people who expect to come or who have always come. For this job he may need tact; but since people generally preserve a fiction that they are overworked already and dislike serving on committees, it is not usually hard to secure their consent to stay away.

If the leader sees no way of getting the meeting down to a manageable size, he can try the following devices: (a) analyze the agenda to see whether everyone has to be present for every item (he may be able to structure the agenda so that some people can leave at half time and others can arrive); (b) ask himself whether he doesn't really need two separate, smaller meetings rather than one big one; and (c) determine whether one or two groups can be asked to thrash some of the topics out in



advance so that only one of them needs to come in with its proposals.

Remember, too, that a few words with a member on the day before a meeting can increase the value of the meeting itself, either by ensuring that an important point is raised that comes better from the floor than from the chair or by preventing a time-wasting discussion of a subject that need not be touched on at all.

### Papers

The agenda is by far the most important piece of paper. Properly drawn up, it has a power of speeding and clarifying a meeting that very few people understand or harness. The main fault is to make it unnecessarily brief and vague. For example, the phrase "development budget" tell nobody very much, whereas the longer explanation "To discuss the proposal for reduction of the 1976-1977 development budget now that the introduction of our new product has been postponed" helps all committee members to form some views or even just to look up facts and figures in advance.

Thus the leader should not be afraid of a long agenda, provided that the length is the result of his analyzing and defining each item more closely, rather than of his adding more items than the meeting can reasonably consider in the time allowed. He should try to include, very briefly, some indication of the reason for each topic to be discussed. If one item is of special interest to the group, it is often a good idea to single it out for special mention in a covering note.

The leader should also bear in mind the useful device of heading each item "For information", "For discussion", or "For decision" so that those at the meeting know where they are trying to get to.

And finally, the chairman should not circulate the agenda too far in advance, since the less organized members will forget it or lose it. Two or three days is about right--unless the supporting papers are voluminous.

Other 'paper' considerations: The order of items on the agenda is important. Some aspects are obvious--the items that need urgent decision have to come before those that can wait till next time. Equally, the leader does not discuss the budget for the re-equipment program before discussing whether to put the re-equipment off until next year. But some aspects are not so obvious. Consider:



- / ☐ The early part of a meeting tends to be more lively and creative than the end of it, so if an item needs mental energy, bright ideas, and clear heads, it may be better to put it high up on the list. Equally, if there is one item of great interest and concern to everyone, it may be a good idea to hold it back for a while and get some other useful work done first. Then the star item can be introduced to carry the meeting over the attention lag that sets in after the first 15 to 20 minutes of the meeting.
- / ☐ Some items unite the meeting in a common front while others divide the members one from another. The leader may want to start with unity before entering into division, or he may prefer the other way around. The point is to be aware of the choice and to make it consciously, because it is apt to make a difference to the whole atmosphere of the meeting. It is almost always a good idea to find a unifying item with which to end the meeting.
- / ☐ A common fault is to dwell too long on trivial but urgent items, to the exclusion of subjects of fundamental importance whose significance is long-term rather than immediate. This can be remedied by putting on the agenda the time at which discussion of the important long-term issue will begin--and by sticking to it.
- / ☐ Very few business meetings achieve anything of value after two hours, and an hour and a half is enough time to allocate for most purposes.
- / ☐ It is often a good idea to put the finishing time of a meeting on the agenda as well as the starting time.
- / ☐ If meetings have a tendency to go on too long, the chairman should arrange to start them one hour before lunch or one hour before the end of work. Generally, items that ought to be kept brief can be introduced ten minutes from a fixed end point.
- / ☐ The practice of circulating background or proposal papers along with the minutes is, in principle, a good one. It not only saves time, but it also helps in formulating useful questions and considerations in advance. But the whole idea is sabotaged once the papers get too long; they should be brief or provide a short

summary. If they are circulated, obviously the chairman has to read them, or at least must not be caught not having read them.

(One chairman, more noted for his cunning than his conscientiousness, is said to have spent 30 seconds before each meeting going through all the papers he had not read with a thick red pen, marking lines and question marks in the margins at random, and making sure these were accidentally made visible to the meeting while the subject was being discussed.)

/ / If papers are produced at the meeting for discussion, they should obviously be brief and simple, since everyone has to read them. It is a supreme folly to bring a group of people together to read six pages of closely printed sheets to themselves. The exception is certain kinds of financial and statistical papers whose function is to support and illustrate verbal points as reference documents rather than to be swallowed whole: these are often better tabled at the meeting.

/ / All items should be thought of and thought about in advance if they are to be usefully discussed. Listing "Any other business" on the agenda is an invitation to waste time. This does not absolutely preclude the chairman's announcing an extra agenda item at a meeting if something really urgent and unforeseen crops up or is suggested to him by a member, provided it is fairly simple and straightforward. Nor does it preclude his leaving time for general unstructured discussion after the close of the meeting.

/ / The chairman, in going through the agenda items in advance, can usefully insert his own brief notes of points he wants to be sure are not omitted from the discussion. A brief marginal scribble of "How much notice?" or "Standby arrangements?" or whatever is all that is necessary.

#### The chairman's job

Let's say that you have just been appointed chairman of the committee. You tell everyone that it is a bore or a chore. You also tell them that you have been appointed "for my sins." But the point is that you tell them. There is no getting away from it: some sort of honor or glory attaches to the chairman's role. Almost everyone is in some way pleased and proud to be made chairman of something. And that is three quarters of the trouble.

Master or servant?

Their appointment as committee chairman takes people in different ways. Some seize the opportunity to impose their will on a group that they see themselves licensed to dominate. Their chairmanship is a harangue, interspersed with demands for group agreement.

Others are more like scoutmasters, for whom the collective activity of the group is satisfaction enough, with no need for achievement. Their chairmanship is more like the endless stoking and fueling of a campfire that is not cooking anything.

And there are the insecure or lazy chairmen who look to the meeting for reassurance and support in their ineffectiveness and inactivity, so that they can spread the responsibility for their indecisiveness among the whole group. They seize on every expression of disagreement or doubt as a justification for avoiding decision or action.

But even the large majority who do not go to those extremes still feel a certain pleasurable tumescence of the ego when they take their place at the head of the table for the first time. The feeling is no sin: the sin is to indulge it or to assume that the pleasure is shared by the other members of the meeting.

It is the chairman's self-indulgence that is the greatest single barrier to the success of a meeting. His first duty, then, is to be aware of the temptation and of the dangers of yielding to it. The clearest of the danger signals is hearing himself talking a lot during a discussion.

One of the best chairmen I have ever served under makes it a rule to restrict her interventions to a single sentence, or at most two. She forbids herself ever to contribute a paragraph to a meeting she is chairing. It is a harsh rule, but you would be hard put to find a regular attender of her meetings (or anyone else's) who thought it was a bad one.

There is, in fact, only one legitimate source of pleasure in chairmanship, and that is pleasure in the achievements of the meeting--and to be legitimate, it must be shared by all those present. Meetings are necessary for all sorts of basic and primitive human reasons, but they are useful only if they are seen by all present to be getting somewhere--and somewhere they know they could not have gotten to individually.

If the chairman is to make sure that the meeting achieves valuable objectives, he will be more effective seeing himself as the servant of the group rather than as its master. His role then becomes that



of assisting the group toward the best conclusion or decision in the most efficient manner possible: to interpret and clarify; to move the discussion forward; and to bring it to a resolution that everyone understands and accepts as being the will of the meeting, even if the individuals do not necessarily agree with it.

His true source of authority with the members is the strength of his perceived commitment to their combined objective and his skill and efficiency in helping and guiding them to its achievement. Control and discipline then become not the act of imposing his will on the group but of imposing the group's will on any individual who is in danger of diverting or delaying the progress of the discussion and so from realizing the objective.

Once the members realize that the leader is impelled by his commitment to their common objective, it does not take great force of personality for him to control the meeting. Indeed, a sense of urgency and a clear desire to reach the best conclusion as quickly as possible are a much more effective disciplinary instrument than a big gavel. The effective chairman can then hold the discussion to the point by indicating that there is no time to pursue a particular idea now, that there is no time for long speeches, that the group has to get through this item and on to the next one, rather than by resorting to pulling rank.

There are many polite ways the chairman can indicate a slight impatience even when someone else is speaking--by leaning forward, fixing his eyes on the speaker, tensing his muscles, raising his eyebrows, or nodding briefly to show the point is taken. And when replying or commenting, the chairman can indicate by the speed, brevity, and finality of his intonation that "we have to move on." Conversely, he can reward the sort of contribution he is seeking by the opposite expressions and intonations, showing that there is plenty of time for that sort of idea, and encouraging the speaker to develop the point.

After a few meetings, all present readily understand this nonverbal language of chairmanship. It is the chairman's chief instrument of educating the group into the general type of "meeting behavior" that he is looking for. He is still the servant of the group, but like a hired mountain guide, he is the one who knows the destination, the route, the weather signs, and the time the journey will take. So if he suggests that the members walk a bit faster, they take his advice.

This role of servant rather than master is often obscured in large organizations by the fact that the chairman is frequently the line

manager of the members: this does not, however, change the reality of the role of chairman. The point is easier to see in, say, a neighborhood action group. The question in that case is, simply, "Through which person's chairmanship do we collectively have the best chance of getting the children's playground built?"

However, one special problem is posed by this definition of the chairman's role, and it has an extremely interesting answer. The question is: How can the chairman combine his role with the role of a member advocating one side of an argument?

The answer comes from some interesting studies by researchers who sat in on hundreds of meetings to find out how they work. Their consensus finding is that most of the effective discussions have, in fact, two leaders: one they call a "team", or "social", leader; the other a "task", or "project" leader.

Regardless of whether leadership is in fact a single or a dual function, for our purposes it is enough to say that the chairman's best role is that of social leader. If he wants a particular point to be strongly advocated, he ensures that it is someone else who leads off the task discussion, and he holds back until much later in the argument. He might indeed change or modify his view through hearing the discussion, but even if he does not it is much easier for him to show support for someone else's point later in the discussion, after listening to the arguments. Then, he can summarize in favor of the one he prefers.

The task advocate might regularly be the chairman's second-in-command, or a different person might advocate for different items on the agenda. On some subjects, the chairman might well be the task advocate himself, especially if they do not involve conflict within the group. The important point is that the chairman has to keep his "social leadership" even if it means sacrificing his "task leadership." However, if the designated task advocate persists in championing a cause through two or three meetings, he risks building up quite a head of antagonism to him among the other members. Even so, this antagonism harms the group less by being directed at the "task leader" than at the "social leader."

#### Structure of discussion

It may seem that there is no right way or wrong way to structure a committee meeting discussion. A subject is raised, people say what they think, and finally a decision is reached, or the discussion is terminated. There is some truth in this. Moreover, it would be a mistake to try and tie every discussion of every item



down to a single immutable format.

Nevertheless, there is a logical order to a group discussion, and while there can be reasons for not following it, there is no justification for not being aware of it. In practice, very few discussions are inhibited, and many are expedited, by a conscious adherence to the following stages, which follow exactly the same pattern as a visit to the doctor:

*"What seems to be the trouble?"* The reason for an item being on a meeting agenda is usually like the symptom we go to the doctor with: "I keep getting this pain in my back" is analogous to "Sales have risen in Germany but fallen in France." In both cases it is clear that something is wrong and that something ought to be done to put it right. But until the visit to the doctor, or the meeting of the European marketing committee, that is about all we really know.

*"How long has this been going on?"* The doctor will start with a case history of all the relevant background facts, and so will the committee discussion. A solid basis of shared and green-on facts is the best foundation to build any decision on, and a set of pertinent questions will help establish it. For example, when did French sales start to fall off? Have German sales risen exceptionally? Has France had delivery problems, or less sales effort, or weaker advertising? Have we lost market share, or are our competitors' sales falling too? If the answers to all these questions, and more, are not established at the start, a lot of discussion may be wasted later.

*"Would you just lie down on the couch?"* The doctor will then conduct a physical examination to find out how the patient is now. The committee, too, will want to know how things stand at this moment. Is action being taken? Do long-term orders show the same trend? What are the latest figures? What is the current stock position? How much money is left in the advertising budget?

*"You seem to have slipped a disc."* When the facts are established, you can move toward a diagnosis. A doctor may seem to do this quickly, but that is the result of experience and practice. He is, in fact, rapidly eliminating all the impossible or far-fetched explanations until he leaves himself with a short list. The committee, too, will hazard and eliminate a variety of diagnoses until it homes in on the most probable--for example, the company's recent energetic and highly successful advertising campaign in Germany plus new packaging by the market leader in France.

*"Take this round to the druggist."* Again, the doctor is likely to take a shortcut that a committee meeting may be wise to avoid. The doctor comes out with a single prescription, and the committee too, may agree quickly on a single course of action.

But if the course is not so clear, it is better to take this step in two stages: (a) construct a series of options--do not, at first, reject any suggestions outright but try to select and combine the promising elements from all of them until a number of thought-out, coherent, and sensible suggestions are on the table; and (b) only when you have generated these options do you start to choose among them. Then you can discuss and decide whether to pick the course based on repackaging and point-of-sale promotion, or the one based on advertising and a price cut, or the one that bides its time and saves the money for heavier new-product promotion next year.

If the item is at all complex or especially significant, it is important for the chairman not only to have the proposed course of the discussion in his own head, but also to announce it so that everyone knows. A good idea is to write the headings on an easel pad with a felt pen. This saves much of the time wasting and confusion that result when people raise items in the wrong place because they were not privy to the chairman's secret that the right place was coming up later on in the discussion.

#### Conducting the meeting

Just as the driver of a car has two tasks, to follow his route and to manage his vehicle, so the chairman's job can be divided into two corresponding tasks, dealing with the subject and dealing with the people.

#### Dealing with the subject

The essence of this task is to follow the structure of discussion as just described in the previous section. This, in turn, entails listening carefully and keeping the meeting pointed toward the objective.

At the start of the discussion of any item, the chairman should make it clear where the meeting should try to get to by the end. Are the members hoping to make a clear decision or firm recommendation? Is it a preliminary deliberation to give the members something to go away with and think about? Are they looking for a variety of different lines to be pursued outside the meeting? Do they have to approve the proposal, or merely note it?

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The chairman may give them a choice: "If we can agree on a course of action, that's fine. If not, we'll have to set up a working party to report and recommend before next month's meeting."

The chairman should make sure that all the members understand the issue and why they are discussing it. Often it will be obvious, or else they may have been through it before. If not, then he or someone he has briefed before the meeting should give a short introduction, with some indication of the reason the item is on the agenda; the story so far; the present position; what needs to be established, resolved, or proposed; and some indication of lines of inquiry or courses of action that have been suggested or explored, as well as arguments on both sides of the issue.

If the discussion is at all likely to be long or complex, the chairman should propose to the meeting a structure for it with headings (written up if necessary), as I stated at the end of the section on "Structure of Discussion." He should listen carefully in case people jump too far ahead (e.g., start proposing a course of action before the meeting has agreed on the cause of the trouble) or go back over old ground, or start repeating points that have been made earlier. He has to head discussion off sterile or irrelevant areas very quickly (e.g., the rights and wrongs of past decisions that it is too late to change, or distant prospects that are too remote to affect present actions).

It is the chairman's responsibility to prevent misunderstanding and confusion. If he does not follow an argument or understand a reference, he should seek clarification from the speaker. If he thinks two people are using the same word with different meanings, he should intervene (e.g., one member using promotion to mean point-of-sale advertising only, and another also including media publicity).

He may also have to clarify by asking people for facts or experience that perhaps influence their view but are not known to others in the meeting. And he should be on the lookout for points where an interim summary would be helpful. This device frequently takes only a few seconds, and acts like a life belt to some of the members who are getting out of their depth.

Sometimes a meeting will have to discuss a draft document. If there are faults in it, the members should agree on what the faults are and the chairman should delegate someone to produce a new draft later. The group should never try to redraft around the table.

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Perhaps one of the most common faults of chairmanship is the failure to terminate the discussion early enough. Sometimes chairmen do not realize that the meeting has effectively reached an agreement, and consequently they let the discussion go on for another few minutes, getting nowhere at all. Even more often, they are not quick enough to close a discussion before agreement has been reached.

A discussion should be closed once it has become clear that (a) more facts are required before further progress can be made, (b) discussion has revealed that the meeting needs the views of people not present, (c) members need more time to think about the subject and perhaps discuss it with colleagues, (d) events are changing and likely to alter or clarify the basis of the decision quite soon, (e) there is not going to be enough time at this meeting to go over the subject properly, or (f) it is becoming clear that two or three of the members can settle this outside the meeting without taking up the time of the rest. The fact that the decision is difficult, likely to be disputed, or going to be unwelcome to somebody, however, is not a reason for postponement.

At the end of the discussion of each agenda item, the chairman should give a brief and clear summary of what has been agreed on. This can act as the dictation of the actual minutes. It serves not merely to put the item on record, but also to help people realize that something worthwhile has been achieved. It also answers the question "Where did all that get us?" If the summary involves action by a member of the meeting, he should be asked to confirm his acceptance of the undertaking.

#### Dealing with the people

There is only one way to ensure that a meeting starts on time, and that is to start it on time. Latecomers who find that the meeting has begun without them soon learn the lesson. The alternative is that the prompt and punctual members will soon realize that a meeting never starts until ten minutes after the advertised time, and they will also learn the lesson.

Punctuality at future meetings can be wonderfully reinforced by the practice of listing late arrivals (and early departures) in the minutes. Its ostensible and perfectly proper purpose is to call the latecomer's attention to the fact that he was absent when a decision was reached. Its side effect, however, is to tell



everyone on the circulation list that he was late, and people do not want that sort of information about themselves published too frequently.

There is a growing volume of work on the significance of seating positions and their effect on group behavior and relationships. Not all the findings are generally agreed on. What does seem true is that:

/□/ Having members sit face to face across a table facilitates opposition, conflict, and disagreement, though of course it does not turn allies into enemies. But it does suggest that the chairman should think about whom he seats opposite himself.

/□/ Sitting side by side makes disagreements and confrontation harder. This in turn suggests that the chairman can exploit the friendship-value of the seats next to him.

/□/ There is a "dead man's corner" on the chairman's right, especially if a number of people are seated in line along from him (it does not apply if he is alone at the head of the table).

/□/ As a general rule, proximity to the chairman is a sign of honor and favor. This is most marked when he is at the head of a long, narrow table. The greater the distance, the lower the rank--just as the lower-status positions were "below the salt" at medieval refectories.

#### Control the garrulous

In most meetings someone takes a long time to say very little. As chairman, your sense of urgency should help indicate to him the need for brevity. You can also suggest that if he is going to take a long time it might be better for him to write a paper. If it is urgent to stop him in full flight, there is a useful device of picking on a phrase (it really doesn't matter what phrase) as he utters it as an excuse for cutting in and offering it to someone else: "Inevitable decline--that's very interesting, George, do you agree that the decline is inevitable?"



### Draw out the silent

In any properly run meeting, as simple arithmetic will show, most of the people will be silent most of the time. Silence can indicate general agreement, or no important contribution to make, or the need to wait and hear more before saying anything, or too good a lunch, and none of these need worry you. But there are two kinds of silence you must break:

1. The silence of diffidence. Someone may have a valuable contribution to make but be sufficiently nervous about its possible reception to keep it to himself. It is important that when you draw out such a contribution, you should express interest and pleasure (though not necessarily agreement) to encourage further contributions of that sort.
2. The silence of hostility. This is not hostility to ideas, but to you as the chairman, to the meeting, and to the process by which decisions are being reached. This sort of total detachment from the whole proceedings is usually the symptom of some feeling of affront. If you probe it, you will usually find that there is something bursting to come out, and that it is better out than in.

### Protect the weak

Junior members of the meeting may provoke the disagreement of their seniors, which is perfectly reasonable. But if the disagreement escalates to the point of suggesting that they have no right to contribute, the meeting is weakened. So you may have to take pains to commend their contribution for its usefulness, as a pre-emptive measure. You can reinforce this action by taking a written note of a point they make (always a plus for a member of a meeting) and by referring to it again later in the discussion (a double-plus).

### Encourage the clash of ideas

But, at the same time, discourage the clash of personalities. A good meeting is not a series of dialogues between individual members and the chairman. Instead, it is a crossflow of discussion and debate, with the chairman occasionally guiding, mediating, probing, stimulating, and summarizing, but mostly letting the others thrash ideas out. However, the meeting must be a contention of ideas, not people.

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If two people are starting to get heated, widen the discussion by asking a question that requires a purely factual answer.

Watch out for the suggestion--squashing reflex

Students of meetings have reduced everything that can be said into questions, answers, positive reactions, and negative reactions. Questions can only seek, and answers only supply, three types of response: information, opinion and suggestion.

In almost every modern organization, it is the suggestions that contain the seeds of future success. Although very few suggestions will ever lead to anything, almost all of them need to be given every chance. The trouble is that suggestions are much easier to ridicule than facts or opinions. If people feel that making a suggestion will provoke the negative reaction of being laughed at or squashed, they will soon stop. And if there is any status-jostling going on at the meeting, it is all too easy to use the occasion of someone's making a suggestion as the opportunity to take him down a peg. It is all too easy and a formula to ensure sterile meetings. The answer is for you to take special notice and show special warmth when anyone makes a suggestion, and to discourage as sharply as you can the squashing-reflex. This can often be achieved by requiring the squasher to produce a better suggestion on the spot. Few suggestions can stand up to squashing in their pristine state: your reflex must be to pick out the best part of one and get the other committee members to help build it into something that might work.

Come to the most senior people last

Obviously, this cannot be a rule, but once someone of high authority has pronounced on a topic, the less senior members are likely to be inhibited. If you work up the pecking order instead of down it, you are apt to get a wider spread of views and ideas. But the juniors who start off should only be asked for contributions within their personal experience and competence. ("Peter, you were at the Frankfurt Exhibition--what reactions did you pick up there?")

Close on a note of achievement

Even if the final item is left unresolved, you can refer to an earlier item that was well resolved as you close the meeting and thank the group.

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If the meeting is not a regular one, fix the time and place of the next one before dispersing. A little time spent with appointment diaries at the end, especially if it is a gathering of five or more members, can save hours of secretarial telephoning later.

Following the meeting

Your secretary may take the minutes (or better still, one of the members), but the minutes are your responsibility. They can be very brief, but they should include these facts:

- ☐ The time and date of the meeting, where it was held, and who chaired it.
- ☐ Names of all present and apologies for absence.
- ☐ All agenda items (and other items) discussed and all decisions reached. If action was agreed on, record (and underline) the name of the person responsible for the assignment.
- ☐ The time at which the meeting ended (important, because it may be significant later to know whether the discussion lasted 15 minutes or 6 hours).
- ☐ The date, time, and place of the next committee meeting.

### APPENDIX 3

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The one business subject not routinely taught in business schools is the planning and execution of meetings. This is sad. With supervisors now spending 70 to 80 percent of their time in meetings, it's obvious that the emphasis must be on effective communication. Anyone who feels inadequate in the skills of group communication should do everything possible to correct this inadequacy, because these skills are important as a means to succeed in business. Indeed, because so many meetings today are considered wastes of time, the supervisor who builds a reputation for holding a good meeting draws favorable attention.

I firmly believe that the answer to more effective meeting leadership is good preparation, correct use of visuals, and close attention to the how-to's of running a successful meeting.

#### When you're the leader

Let's assume that you have been called upon to lead an important meeting. You have prepared thoroughly. You've analyzed the participants and anticipated their needs, interests, and input; you've established your specific purpose; allocated enough time for each topic; prepared an orderly agenda; and, in advance of the meeting, you've let participants know what it's about, what they're expected to contribute, and how long it will last. You've invited those who can attend, who will carry out what will be decided, who have good ideas, who can approve results, and who can represent divergent views. You've checked and rechecked the meeting room to see that adequate provision has been made for visual aids, acoustics, and ventilation, among other essentials, and you've checked the equipment.

Now, it's up to you to get the meeting going, to keep it alive, and to make certain it is productive. Be sociable, and help everyone feel comfortable. Ask them general questions and thank them for coming.

#### Lay the ground rules

The best ways to begin a meeting is to project a visual of the agenda. It shows the participants you are organized and will demand their attention. Be sure, however, to have the meeting agenda circulated before the meeting. Whenever possible, stipulate who will speak and for how many minutes on each topic.

As you project your visual of the agenda, announce: "We're going to stick to the time allotted in order to respect your time." In this way, you are clearly setting the ground rules. Later, if anyone takes up too much time on any one topic, the meeting leader can remind the group that a lot must be discussed and that the meeting must continue. In this way, you



## APPENDIX 3 cont.

as a leader are putting the burden on the group rather than on yourself to keep the meeting moving on time. Then, with one eye on the clock and the other on the agenda, move the discussion along.

If there is hostility about subjects to be discussed in the meeting, bring it out in the open immediately. You could say, "I'm well aware there are strong feelings about matters on the agenda today. I respect where you're coming from. I know some of you are not happy to be here. I know how I'd feel in these circumstances." They should know that you do indeed understand how they feel.

### Keep the discussion lively

Here are some tried-and-true methods for keeping a lively discussion going:

Stimulate the discussion. Keep the group on target by asking questions of individual members. Avoid phrasing questions with "yes" or "no" responses. Call on participants by name: "Mary, what do you think?" It's a good idea to state the person's name before asking the question. In so doing you will avoid embarrassing an individual whose attention is at a low ebb. Make it a practice, at least initially, to call on specific individuals who look friendly - not people whose arms are folded defensively, for example - to help get the discussion under way or to assist in moving it along.

Balance the discussion. Get everyone involved; move the discussion around; know the issues, the people, and their viewpoints. Make certain both sides of a particular issue come to light. If someone hogs the floor, wait for a remark that permits you to interrupt, then turn the discussion over to someone else. For example, "You've brought up a good point, Joe. Let's see what other members of the group feel about this. Mary, what would you suggest we do?"

Control the discussion. Call a short recess or tell a suitable anecdote if things get out of hand, but do not discourage a spirited discussion that is on a friendly and constructive basis. You'll have better control, too, if you don't distribute any written reports during the meeting.

Be aware of your own presentation techniques. Some meeting leaders detract from their performance and destroy the group dynamics that can make a meeting truly productive. There's the "musician," for example, who continuously and nervously rattles coins or twirls beads; the "meeting hog," who encourages resentment by never giving anyone else a chance to contribute an independent thought, and "the judge," who publicly chastises or ridicules group members.

### Dealing with problems

As a meeting leader, it's important to know how to deal with negative viewpoints and problems that people can cause.



### APPENDIX 3 cont.

Most meetings have three types of participants: those who are helpful, those who are negative, and those who are passive. All three kinds can cause problems.

Friendly participants tend to be eager and ambitious; hence, they may dominate a meeting. So use the helpful person to best advantage but don't allow him or her to steal the show.

Of the negativists, there are primarily three types: rude persons, hecklers, and recalcitrants. Rude participants often talk on the side or do independent paperwork. The best approach probably is to address specific questions to them for comment. When two people in the group talk to each other instead of listening to you, there's only one sure way to stop them: smile, look directly at the talkers, and pause until they have stopped talking.

If you're dealing with a heckler with a negative viewpoint, don't argue or chastise. If you lose your "cool," the negativist "wins." Instead, try to get people in the audience to help you. Go back to the friendly participants and ask, "What do you think?" Raise questions that bring in the other sides of the problem, or put the burden on the negative individual to be positive. Ask him or her, for example, "What do you recommend we do?" If a heckler continues to be disruptive, chances are the group will take care of it.

If you can predict well in advance of a meeting that an individual is certain to be negative, first try meeting privately. You can often satisfy these individuals by asking their opinions and letting them air their views. Then suggest, "Let's go to the meeting and see what the others think."

At the other extreme are the blackouts, that is, those who do not participate. You can help to get passive individuals involved by calling on them with open-ended questions, especially at the beginning of the meeting. Remember, they can't tune you out if you call on them for an opinion: "Charlie, how do you feel about this?" Be alert for logical opportunities to seek the comments or opinions of these noncommunicative types, rather than risk embarrassing them by drawing them into the discussion just for the sake of participation.

You also can encourage participation by asking for a show of hands, by instructing everyone to "write down these three points," and by eye contact. Eye contact is important in establishing rapport with the group. Such body language can make people feel you're talking with them personally.

#### Using visuals

As a meeting leader, it's crucial that you know how to use visuals to increase retention and maintain control.

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When relying on verbalization alone to communicate, an estimated 90 percent of a message is misinterpreted or forgotten entirely. We retain only 10 percent of what we hear. But, adding appropriate visual aids increases retention to approximately 50 percent.

While there are many types of visuals on today's markets, the overhead projection system is preferable for most meetings. Here are some reasons why:

- You can present to any size group in a fully light room.

- You face the group. You'll have better meeting control and will be able to pick up group reactions immediately.

- The on-off technique directs attention to you or the screen. If you want to make a verbal point, turn the machine off and all eyes will turn to you.

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- Maybe the most important of all, overhead transparencies can be made quickly and inexpensively on either the office plain paper copier or an infrared transparency maker. Color can be used as desired.

### Recap

As a measure of your control as a meeting leader, it's important to recap and summarize what has been decided at each juncture of the agenda. In this way, you are reminding the group that "Here's where we are, here's where we're going" before moving on to the next point of the agenda. Remember, too, if you are presenting information, questions should be welcome; then you can be sure everyone understands what you said.

At the conclusion of the meeting, remember these three R's: recap, restate, and recommend. Always be positive. Give a summary of what has transpired, then introduce the benefits with positive statements such as, "I think we're all going to be very pleased with what has been decided here. I'd like to recommend that we go ahead with this new program."

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Because meetings are a part of legitimate management functions, their effects should be measured. For example, if a meeting sets a goal, was the goal attained? The key to effective followup is to build in checkpoints requiring progress reports. To know what is going on you need elements of feedback. That means fixing accountability. This basically means making assignments for which one or more people will be held specifically responsible.

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If you are using an overhead projector, you can summarize decisions as they are reached by writing directly on a piece of blank film. When action by an individual should be taken, that person's name or initials should be written at the left-hand side at the appropriate spot under the inscription "action." Then the final version can be run off on a copier and handed out to all participants at the end of the meeting.

As deadlines approach, a single copy of the "action minutes" with the date circled is a sufficient reminder and provides the person doing the reminding with a certain amount of authority.

Remember, good meetings don't just happen. They are carefully thought-out, well-executed events that affect the bottom line of your company. The few fundamental strategies and techniques outlined here can help you to achieve excellent meetings that are so essential to your continuing supervisory success.

Here are some final tips to help you as a meeting leader improve communication:

- Start and finish on time.
- Know what you want to say.
- Talk the participants' language.
- Make your presentation simple and to the point.
- Speak clearly; be confident and enthusiastic.
- Take a break if the meeting runs too long.
- Close on a positive note, and make sure everyone understands what's been decided.
- Don't dominate a meeting called to get ideas.
- Don't get upset when people disagree with you.
- Don't try to be funny when you're not.
- Don't make fun of anyone.
- Don't allow arguments.
- Keep the meeting lively and moving forward.

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- Make your presentation simple and to the point.
- Speak clearly; be confident and enthusiastic.
- Take a break if the meeting runs too long.
- Close on a positive note, and make sure everyone understands what's been decided.
- Don't dominate a meeting called to get ideas.
- Don't get upset when people disagree with you.
- Don't try to be funny when you're not.
- Don't make fun of anyone.
- Don't allow arguments.
- Keep the meeting lively and moving forward.